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U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES  
SUBSTANCE ABUSE AND MENTAL HEALTH SERVICES ADMINISTRATION

**Center for Mental Health Services  
Crisis Counseling Program**

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**DATA COLLECTION  
TOOLKIT**

**FINAL DRAFT**



***SAMHSA***

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# FOREWORD

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The Federal Emergency Management Agency (FEMA) and the Center for Mental Health Services (CMHS) receive many requests for demographic statistics on the people who access crisis counseling services through the Crisis Counseling Assistance and Training Program (CCP) grants. Historically, each State has reported defined and reported data using their own procedures, making it extremely difficult to aggregate data and report national statistics. State disaster mental health coordinators have also told CMHS that the forms used for collecting data were confusing and the instructions unclear. FEMA and CMHS recognize that accurate data is essential to carrying out program management and monitoring responsibilities. Additionally, in order to fulfill the requirements of the Government Performance and Results Act, as well as justify the program to Congress, accurate, standard reporting methods be implemented in order to aggregate the data and report it with confidence to interested parties.

The data collection procedures described in this document are the product of much effort on the part of consultants, interagency partners and State disaster mental health coordinators. These procedures are considered a final draft while they are being pilot tested in six States. Based upon feedback received from this pilot project, FEMA and CMHS will make any potential changes and finalize these forms and procedures. Comments, suggestions or questions may be addressed to:

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# INTRODUCTION

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Reporting requirements for the Crisis Counseling Assistance and Training Program (CCP) are established by regulation 44 CFR 206.171 (Crisis Counseling Assistance and Training Program) for both Individual Services Program (ISP) grants, which provide funds for up to 60 days of services immediately following a Presidential disaster declaration, and Regular Services Program (RSP) grants, which provide funds for up to 9 months following a disaster declaration. Although the Center for Mental Health Services (CMHS) provides a limited amount of technical assistance to ISP, the monitoring responsibility remains with the Federal Emergency Management Agency (FEMA). For RSP, FEMA has designated CMHS as the authority responsible for monitoring State programs.

FEMA and CMHS are striving to develop and define standard terminology and data collection methods for the CCP. In order to aggregate data and report the results to the nation with confidence, FEMA and CMHS need to collect data from States in a consistent manner. States need to collect data throughout the project period of a CCP grant to meet the reporting requirements for these grants, and because most CCP grants include more than one service provider, it is important to establish consistent methods of collecting data from all service providers within the project.

The Data Management Toolkit has been developed to assist States administering CCP grants to collect, process, and report data. The tools provided within the Data Management Toolkit include definitions and descriptions of the various types of services and guidance on how to count and record them, a Microsoft Access 2000 database file, and data collection worksheets. The toolkit includes five sections:

- Data Collection
- Data Processing
- Reports
- Glossary
- Diskettes (database and worksheets)

**Data Collection**—describes how to collect data in a consistent manner by using daily worksheets and weekly tally sheets to record crisis counseling services. The data recorded on the worksheets meet the basic Federal requirements for collecting numerical data on CCP services. The State also will be required to submit narrative information in support of the numerical data. State or local mental health authorities may collect additional data if needed for program oversight and management. All of the data collection worksheets may be modified to include additional information required by State or local authorities.

**Data Processing**—explains how to process the data collected using the Data Management System developed using Microsoft Access 2000. The database is an optional tool developed to assist the States in processing data. The file may be modified by States to meet their reporting requirements or replaced by another program or mechanism for computing data.

*Reports*—describes the report function of the CCP Data Management System. Numerical reports are automatically generated on services and demographic information. Additional narrative information is required for all quarterly and final reports, and the complementary roles of the two types of reports are described.

*Glossary*—is a reference section that defines and standardizes the terms used in all other sections of the toolkit.

*Diskettes*—provides copies of the CCP Microsoft Access 2000 file and the data collection worksheets written in Microsoft Word 2000.

# DATA COLLECTION

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Data collection on crisis-counseling services is the responsibility of all members of the project staff, including indigenous workers, paraprofessionals, and professionals, all of whom will be referred to as crisis counselors for the purposes of this guidance. The data are used for project monitoring and oversight, reporting requirements, and as the basis for national guidance on the Crisis Counseling Program (CCP). Data need to be collected in a consistent manner by all crisis counselors in order to obtain information that is meaningful and useful. The Center for Mental Health Services (CMHS) and the Federal Emergency Management Agency (FEMA) recommend that initial training for crisis counselors include a section on data collection. Therefore, crisis counselors should be introduced to the information and data collection worksheets described in this section. Instructions on how to complete and submit the data collection worksheets should be provided to the project staff as early as possible in their training.

In this section the following three major crisis counseling service categories are defined, and worksheets are provided for collecting daily data and tallying data on a weekly basis:

- Educational Services
- Individual Crisis Counseling Services
- Group Crisis Counseling Services

The types of services included in each category are described; examples are provided, showing how to complete each section of the worksheet(s); and instructions are given on when and how to count a service.

## Differentiating Types of Services

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Crisis counselors need to be trained to differentiate between material distribution and individual educational services, individual educational services and individual crisis counseling services, and group educational services and group crisis counseling services. Project Managers should therefore spend time discussing the different types of services.

## Educational Services

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The educational portion of the CCP consists of much more than handing out brochures. Every interaction with a disaster survivor offers an opportunity to help provide information that will assist with the healing process. Crisis counselors provide an important service to the community when they share information directly with individuals. This important service needs to be recognized and credited in reporting requirements.

A contact is considered to be an educational service when the outcome is dissemination of information on the project or key disaster crisis counseling concepts. The contact becomes an individual or group counseling session if it goes beyond education and assist the person(s) to understand their current situation and reactions, review their options, and address the available emotional support or referral services.

Educational services include material distribution, individual educational services, and group educational services. The data collection requirement for educational services does *not* include demographic or other personal information on individual disaster survivors. Data are only collected on the number of persons receiving services. The data collection for the three types of educational services consists of the following:

- ***Material distribution*** captures the number of handouts, flyers, and other materials distributed throughout the community. When crisis counselors distribute material, they may speak briefly with the disaster survivor. If the discussion focuses on the material being distributed or general questions on the project, the contact is counted as a material distribution. For example, material distribution occurs when the crisis counselor hands a disaster survivor a brochure or handout. The disaster survivor may ask, “What is this?” The crisis counselor describes the material and the disaster survivor asks a few additional questions on how to access services, says thanks, and walks off. Crisis counselors should count a contact as a material distribution if the interaction is limited to a few questions on the material or general questions about who the crisis counselors are and what services they offer.

A contact with a disaster survivor may progress from material distribution to an individual educational service to an individual crisis counseling service. However, the crisis counselor will only count the contact once—at the highest level of interaction.

- ***Individual educational services*** occur when the crisis counselor discusses educational information with a disaster survivor. The discussion is not focused solely on material being distributed, but is a more general discussion of disaster services and key concepts of disaster mental health. These contacts are generally brief, informal, and occur throughout the disaster-impacted area at locations such as food distribution centers, Disaster Recovery Centers (DRCs), and other disaster recovery locations. If the crisis counselor speaks to more than one person at a time, he or she will count each person as an individual educational service. Individual educational services often begin as a material distribution and move on to a more in-depth conversation. The contact has moved past material distribution into an individual educational service when a disaster survivor stops to read the material and asks questions on the content and how it applies to him or her. The contact becomes an educational service when the disaster survivor departs understanding psycho-educational information that can assist him or her in the recovery process.
- ***Group educational services*** include public speaking at community forums, service group meetings, and local government meetings. The focus of the group educational services is to provide psycho-educational information for survivors, including available crisis counseling services and key concepts of disaster mental health. Group educational services are often formal presentations at scheduled events.

## **Material Distribution**

### **Recording Contacts**

Each crisis counselor is responsible for recording daily services, submitting weekly tally sheets, and complying with the Project Manager's instructions for submitting data collection forms. The Project Manager or designated staff will total the data for each team and enter the data into the CCP Data Management System described in the section on Data Processing. The goal of the data collection system developed by CMHS is to estimate the number of individuals and groups that receive services. The intent is not to compare or monitor individual workers. Therefore, the data collected are reported to the Federal government by teams or geographic areas and not individual workers.

**The Educational Data Collection worksheet is used to collect daily data and to tally weekly services. Daily data and weekly totals are reported on separate worksheets for Individual and Group Crisis Counseling services.**

The purpose of the material distribution category is to capture information on the amount of material that is disseminated throughout the community and directly to disaster survivors. As crisis counselors distribute materials, they will often spend time conversing with disaster survivors. Data on material distribution are therefore divided into two categories in order to capture the depth of the interaction with disaster survivors:

- Material left in public places;
- Material handed to people with no further interaction;

The counting process can be simplified by giving crisis counselors material for distribution in public places in bundles of set amounts, such as 10, 20, or 50. The crisis counselor will only have to remember how many bundles they distributed to public places and multiply that number by the number of materials per bundle.

When crisis counselors are conducting outreach in neighborhoods or throughout a community, it is recommended they start the day with a set number of materials. At the end of the day they will know how many brochures, handouts, etc., they distributed by subtracting the number left from the amount they started with. The counselors will also need to track the number of people they had brief discussions with while distributing materials.

**Keep it simple.** Making checks on a card or clipboard or some other method may be used to count material distribution followed by a brief discussion and provision of individual educational services.

### **Example of Material Distribution**

Distributed material should only be counted once. For example, if crisis counselor, L. Johnson, starts Monday with 200 brochures, distributes 25 to a senior center, 25 to a DRC, hands out 75 brochures to people, and at the end of the day has 75 brochures left, his material distribution totals 125. Below is the material distribution portion of the Educational Services Worksheet completed on Monday for L. Johnson.



## MATERIAL DISTRIBUTION

TYPE OF MATERIAL DISTRIBUTION	NUMBER DISTRIBUTED							
	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
Material left in public places		50						
Material handed to people with no further interaction		32						
Material handed to people followed by a brief discussion of the material		75						

(125)

### Additional Guidance

**Counting Material Distributed By More Than One Crisis Counselors**—If more than one crisis counselor speaks with the disaster survivor and the interaction is classified as a material distribution, only the staff member handing out the material should count the contact. The data collection about material distribution is to determine the quantity of material distributed in the community and how it was distributed. If each counselor counted the contact, it would inflate the data for material distribution. Project Managers should stress the fact that the intent of the data collection is not to determine who distributes the most materials or to measure a crisis counselor's performance, but to determine for future programs the number of disaster survivors that can be reached through material distribution.

**Distributing Multiple Documents**—Materials may contain more than one page or more than one type of item. Count each set of material as one distribution. Trying to keep track of how many of each type material are distributed is not necessary. The intent is not to count the number of pages, but to determine how many people were reached through educational materials.

### *Individual Educational Services*

#### Recording Contacts

Individual educational services are simple to count. The crisis counselors count the number of people to whom they provided individual education services in-person and on the telephone each day.

## Example of Individual Educational Service

If L. Johnson actually provided individual educational services to 4 of the 75 contacts previously recorded as being material distribution, the worksheet would change as follows:

### MATERIAL DISTRIBUTION

TYPE OF MATERIAL DISTRIBUTION	NUMBER DISTRIBUTED							
	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
Material left in public places		50						
Material handed to people with no further interaction		32						
Material handed to people followed by a brief discussion of the material		71						

### INDIVIDUAL EDUCATIONAL SERVICES

TYPE OF CONTACT	NUMBER OF CONTACTS							
	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
In-person brief contact		4						
Telephone contact		0						

## Additional Guidance

A contact with a disaster survivor may begin as a material distribution and progress to an individual educational service or individual crisis counseling service. The contact should be counted at the highest level of interaction with an individual. The services that require the most time are considered the highest level, with the levels of interaction ranging from material distribution to individual educational service to individual crisis counseling. Because it is important that a contact be counted at the highest level of service, it is best to record the type of service after the contact is concluded so that the counselor can mentally review the discussion and decide what type of service was provided. If the counselor is not sure how to classify the contact, he or she may wish to discuss the matter with a teammate or supervisor.

## Group Educational Services

### Recording Contacts

The purpose of data collection for group educational services is to determine the types of groups that request group educational services, the focus of the presentations, and the number of

participants. No data are required on the individuals participating in the group. If two crisis counselors co-present to the group, only the lead staff member reports the contact. Again, data are being collected for teams, not individual performance.

### Example of Group Educational Service

L. Johnson conducts three group educational presentations in one week. Two of the presentations are to neighborhood groups and the third is to other agencies responding to the disaster. The group educational services are recorded as follows:

#### GROUP EDUCATIONAL SERVICES

DATE	NAME/TYPE OF GROUP	FOCUS OF PRESENTATION	NUMBER OF PARTICIPANTS
5/15/01	Disaster Agencies	Overview of project, coordination w/ other agencies	22
5/16/01	Kingsford Neighborhood	Overview of project and disaster mental health	13
5/17/01	Fairfax Neighborhood	Overview of project and disaster mental health	10
<b>Number of Groups: 3</b>		<b>Total Number of Participants: 45</b>	

### Additional Guidance

If the crisis counselors are handing out brochures and three people come up together and begin a discussion of the material, the contacts are counted as three individual educational services. However, if the crisis counselor gives a presentation to a group of people and after the presentation several people come up and ask more questions, those individuals are already included in your group participant total so there is no need to count them again.

Group educational services are generally planned events. Crisis counselors make formal presentations on psycho-educational topics during a group educational service, as opposed to an open conversation with more than one person.

### Educational Services Worksheet

A copy of the Educational worksheet used to collect daily data and submit weekly totals is provided on the following page. At the top of the worksheet the crisis counselors will record their name or Employee ID, team, week, and the location where services were provided. Because material distribution may be done over large geographic areas the location may be listed as a county, city, or other area.

**[INSERT PROJECT TITLE]**

**EDUCATIONAL SERVICES**

Employee ID: \_\_\_\_\_ Date: \_\_\_\_\_ Team: \_\_\_\_\_

Location/Neighborhood: \_\_\_\_\_

**MATERIAL DISTRIBUTION**

TYPE OF MATERIAL DISTRIBUTION	NUMBER DISTRIBUTED							
	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
Material left in public places								
Material handed to people with no further interaction								
Material handed to people followed by a brief discussion of the material								

**INDIVIDUAL EDUCATIONAL SERVICES**

TYPE OF CONTACT	NUMBER OF CONTACTS							
	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
In-person brief contact								
Telephone contact								

**GROUP EDUCATIONAL SERVICES**

DATE	NAME/TYPE OF GROUP	FOCUS OF PRESENTATION	NUMBER OF PARTICIPANTS
Number of Groups:		Total Number of Participants:	

## **INSTRUCTIONS FOR THE EDUCATIONAL SERVICES FORM**

This form may be used to tally services provided for one full week and should be turned in at the end of the week for data entry.

**Employee ID:** Enter the Employee ID of the outreach worker. The Employee ID is a unique identifier usually consisting of the first four letters of the individual's last name and four unique numbers such as the last four digits of the employee's social security number, telephone number, etc.

**Project Managers are free to add specific instructions on the back of the data collection worksheet. Information such as when and where to submit forms may be helpful.**

**Date:** Enter either the date this worksheet is begun or the date the worksheet is turned in. The Team Leader will determine which date to use so that all team members date their forms consistently.

**Team:** Enter the name of the team that the outreach worker works with. Not all projects use a team structure so leave space blank or enter N/A if this does not apply.

**Location/Neighborhood:** Enter the general location where the educational services were provided. This could be a public library, a church basement, or the Arlington Heights neighborhood.

**Material Distribution:** Data on material distribution records the number of handouts, brochures, flyers and other materials distributed throughout the community. Each contact is only counted once; *don't* count the contact as both a material distribution and an individual educational service or individual crisis counseling service.

**Individual Educational Services:** Individual education services occur when the outreach worker or crisis counselor briefly discusses educational information with a disaster survivor. The discussion does not focus solely on the materials being distributed, but is a more general discussion on disaster services and/or key concepts of disaster mental health. These contacts are generally informal and occur throughout the disaster-impacted area at locations such as food distribution centers, community centers, Disaster Recovery Centers, etc. Each contact with a disaster survivor should only be reported once. If the crisis counselor/outreach worker moves beyond educational services and assists the disaster victim to understand their current situation and reactions and review their options, and provides emotional support or referral services, the contact should be reported as an individual crisis counseling contact, not an educational service.

**Group Educational Services:** Public speaking at community forums, service group meetings and local government meetings are examples of group educational services. The focus of group educational services is the providing of general psycho-educational information to survivors on the disaster services available and the key concepts of disaster mental health. The group educational service is *not* focused on assisting individual participants to understand their current situation and reactions, to review their options, or to address their emotional support and provide referral services. (A group service that focuses on the needs of individual participants should be recorded as a group crisis counseling session.) Provide the name of the group if there is one, describe the type of group (i.e., neighborhood group, church group, school group, disaster worker, etc.) and in a few words describe the focus of the presentation.

## Individual Crisis Counseling Services

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The biggest difference between educational and counseling services is the outcome of the service. The educational service shares information that can help the disaster survivor to help him or herself or refers the disaster survivor to another disaster relief organization. Counseling services provide practical and emotional support.

A contact is reported as an individual crisis counseling service if the outreach worker or crisis counselor helps the disaster survivor understand his or her current situation and reactions to the disaster and review their options, and provides emotional support or referral services. The disaster survivor will generally share information regarding their disaster experience during an individual crisis counseling service. The crisis counselor or outreach worker will gain insight into how the person is coping and assists the disaster survivor to normalize his or her experience. Referrals to other services are made as needed. The types of crisis counseling services offered by the project are outlined in CMHS's Program Guidance CCP-PG-03, *Staff Roles and Services Within Crisis Counseling Programs* (2000):

- Active and supportive listening;
- Validation of the appropriateness of an individual's feelings and reactions;
- Affirmation that such feelings and reactions are normal;
- Education of survivors about ways to manage their distress and take care of themselves as they pursue recovery;
- Assistance to survivors in determining their priorities and developing plans for meeting those priorities; and
- Information and referral on disaster assistance and human services resources.

### Recording Contacts

A contact sheet is completed for every disaster survivor who receives individual crisis counseling services. This sheet requires the crisis counselor to record demographic data and disaster reactions and should be filled out after the counseling service is provided, not during the counseling session. The information recorded is based on the crisis counselor's observations and what the disaster survivor says. The contact sheet should not be used as a survey of the person. The Individual Crisis Counseling worksheet is the crisis counselor's personal record and will remain in their possession. Information will be tallied on a separate worksheet and submitted for data collection purposes. Each part of the worksheet is discussed in this section and a copy of the whole worksheet is provided at the end of the section. Project Managers need to inform crisis counselors that confidentiality must be maintained and that there is a risk that their notes could be subpoenaed by a court of law. Although this has not happened, crisis counselors should be informed that their notes are probably not protected by as client/patient privilege in a court of law.

### Example of Individual Crisis Counseling

**Worker Information**—At the top of the worksheet the crisis counselor should enter his or her name or Employee ID, the date, and the team name. The location where the services were provided is recorded in the final line. (Enter "telephone" if the service was provided over the telephone.)

**Employee ID:** \_\_\_\_\_ **Date:** \_\_\_\_\_ **Team:** \_\_\_\_\_  
**Location/Neighborhood:** McDonalds on Spring Dale Hwy

**Disaster Survivor Name and Address**—The first box asks for the name and address of the survivor, if needed. The crisis counselor will only record the disaster survivor’s name and address if they will be seeing the survivor again or making a referral. Once a name is written on a contact sheet it becomes confidential information and should be treated accordingly. The disaster survivor’s name and address will not be recorded in the data collection process. The information is only to be used by the crisis counselor providing services to the disaster survivor or for referrals

**NAME AND ADDRESS, IF NEEDED:**

John D., temporary residence: Oak Hill Motel (Spring Dale Highway)

**Demographic Information**—The next section of the Individual Crisis Counseling Worksheet captures demographic information. The crisis counselor records demographic data based on observations and conversations with the disaster survivor. The State has the flexibility to determine how old a person must be to be classified as an older adult. The State also has the option of defining older adult by other factors, such as retirement or how the disaster survivor identifies him or herself. The age of children can generally be estimated based on where they go to school (i.e., elementary school, middle school, or high school).

DEMOGRAPHIC INFORMATION		
<b>AGE (CHECK ONE)</b> <input type="checkbox"/> PRESCHOOL (0-5) <input type="checkbox"/> CHILDHOOD (6-11) <input type="checkbox"/> PREADOLESCENT/ <input type="checkbox"/> ADOLESCENT (12-17) <input type="checkbox"/> ADULT <input type="checkbox"/> OLDER ADULT	<b>ETHNICITY</b> <input type="checkbox"/> WHITE <input type="checkbox"/> HISPANIC ORIGIN <input type="checkbox"/> BLACK <input type="checkbox"/> AMERICAN INDIAN/ALASKA NATIVE <input type="checkbox"/> ASIAN & PACIFIC ISLANDER <input type="checkbox"/> MIDDLE EASTERN <input type="checkbox"/> OTHER: _____ <input type="checkbox"/> DON'T KNOW	<b>SEX</b> <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE <hr/> <b>PREFERRED LANGUAGE</b> <input type="checkbox"/> ENGLISH <input type="checkbox"/> SPANISH <input type="checkbox"/> AMERICAN SIGN LANGUAGE <input type="checkbox"/> OTHER: _____

Multiple boxes may be checked for ethnicity. The “other” box should be checked if none of the categories apply. The crisis counselors may also elect to check “don’t know” if ethnic background is unknown.

The primary language of the disaster survivor should be checked or entered on the “other” line. If the disaster survivor would be more comfortable receiving services in a language other than English, the crisis counselor should note that services are requested in another language and be specific about the language in the “notes” box at the bottom of the worksheet. Since many languages have different dialects, information about the specific dialect should also be indicated if appropriate. The request for services in a language other than English should be conveyed to the Project Manager as soon as possible.

**CAUTION!**

**When working with families, counselors should never use children as translators for their non-English-speaking parents/relatives.**

**Reactions**—Behavioral, emotional, physical, and cognitive reactions of the disaster survivor are recorded in the next block. The lists are not complete and crisis counselors may write additional reactions in “other.” If more space is needed, the margins or the “notes” section of the worksheet may also be used.

EVENT REACTIONS			
<b>BEHAVIORAL</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Extreme changes in activity level</li> <li><input type="checkbox"/> Excessive drug, alcohol, or prescription use</li> <li><input type="checkbox"/> Isolation/withdrawal</li> <li><input type="checkbox"/> Hyper-vigilance</li> <li><input type="checkbox"/> Reluctant to leave home</li> <li><input type="checkbox"/> Violent behavior</li> <li><input type="checkbox"/> Other: _____</li> </ul>	<b>EMOTIONAL</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Sadness, tearful</li> <li><input type="checkbox"/> Irritability, anger</li> <li><input type="checkbox"/> Feeling anxious, fearful</li> <li><input type="checkbox"/> Despair, hopeless</li> <li><input type="checkbox"/> Feelings of guilt or shame</li> <li><input type="checkbox"/> Feeling emotionally numb, disconnected</li> <li><input type="checkbox"/> Other: _____</li> </ul>	<b>PHYSICAL</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Headaches</li> <li><input type="checkbox"/> Stomach problems</li> <li><input type="checkbox"/> Difficulty falling or staying asleep</li> <li><input type="checkbox"/> Difficulty eating</li> <li><input type="checkbox"/> Worsening of chronic health conditions</li> <li><input type="checkbox"/> Fatigue/exhaustion</li> <li><input type="checkbox"/> Chronic agitation</li> <li><input type="checkbox"/> Other: _____</li> </ul>	<b>COGNITIVE</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Inability to accept/cope with death of loved one(s)</li> <li><input type="checkbox"/> Distressing dreams or nightmares</li> <li><input type="checkbox"/> Intrusive thoughts or images</li> <li><input type="checkbox"/> Difficulty concentrating</li> <li><input type="checkbox"/> Difficulty remembering things</li> <li><input type="checkbox"/> Difficulty making decisions</li> <li><input type="checkbox"/> Preoccupation with death/destruction</li> <li><input type="checkbox"/> Suicidal thoughts or feelings</li> <li><input type="checkbox"/> Other: _____</li> </ul>

The purpose of this section of the worksheet is to record the basic reactions of the disaster survivors. The crisis counselor may check any number of reactions from as many different categories as apply. The demographic and reaction blocks of the worksheet should not be used as a checklist during the individual crisis counseling service nor marked in the presence of the disaster survivor. The demographic data and reactions observed by the crisis counselor and described by the disaster survivor should be recorded after the individual crisis counseling service is complete.

**CAUTION!**

The event reaction section of this worksheet can also be used as an assessment tool. Disaster survivors experiencing many of the symptoms may be in serious distress. The crisis counselor needs to pay careful attention to the survivor's symptoms and the services being provided to ensure that the survivor receives the most appropriate and effective intervention for their situation.

A new worksheet is completed every time the crisis counselor provides an individual crisis counseling service for a particular disaster survivor. Disaster reactions may change over time or disaster survivors may reveal different concerns, so the disaster reactions recorded may differ from session to session.

**Other Key Characteristics/ Experiences**—This information describes how much direct exposure a survivor had with the disaster. Reviewed in conjunction with the event reactions, this information can be used by the crisis counselor to assess the survivor's need for intervention and at what intensity (i.e., brief supportive visits by the crisis counselor, professional therapy, hospitalization, or medication).

**Referral**—Referrals are key components of the Crisis Counseling Program. The majority of survivors have needs that can be met by short-term, relatively informal interventions. However, under some circumstances, disaster survivors may need long-term, more formal mental health services that are beyond the scope of the CCP. Survivors requiring longer-term, more formal mental health treatment should be referred to an appropriate agency or licensed mental health professional. Disaster recovery needs may be physical, structural, or economical in nature and addressing these issues is outside the range of the CCP. In these instances, CCP staff members play a key role in referring survivors to specific disaster services available through FEMA



Teleregistration, the American Red Cross, the Salvation Army, Interfaith Disaster Recovery Services, Victims of Crime Services, and Unmet Need Committees.

<p><b>REFERRAL</b></p> <p><input type="checkbox"/> Within project (specify) _____</p> <p><input type="checkbox"/> Other disaster agencies</p> <p><input type="checkbox"/> Professional mental health services</p> <p><input type="checkbox"/> Substance abuse treatment</p> <p><input type="checkbox"/> Other community services</p> <p><input type="checkbox"/> Other: _____</p> <p><b>Was the referral accepted by the individual?</b></p> <p><input type="checkbox"/> Yes</p> <p><input type="checkbox"/> No</p>	<p><b>OTHER KEY CHARACTERISTICS/EXPERIENCES</b></p> <p><input type="checkbox"/> Past or preexisting trauma or psychological problems or substance abuse problems</p> <p><input type="checkbox"/> Injured as a result of event</p> <p><input type="checkbox"/> At risk of losing life during event</p> <p><input type="checkbox"/> Loved one(s) missing or dead</p> <p><input type="checkbox"/> Coworker/friend(s) missing or dead</p> <p><input type="checkbox"/> Witnessed death or injury of others</p> <p><input type="checkbox"/> Displaced from home</p> <p><input type="checkbox"/> Displaced from or lost job</p> <p><input type="checkbox"/> Assisted with rescue/recovery</p> <p><input type="checkbox"/> Has physical disability that limits mobility/independence</p>
---	--

In the first box, the crisis counselor checks the kind of referral made. In the second box, the crisis counselor will provide additional information if a referral is made within the crisis counseling project. The counselor will also indicate whether the suggested referral was accepted by the disaster survivor. The Project Manager should provide guidance to crisis counselors about the type of information needed for referrals within the project.

### Additional Guidance

Individual crisis counseling services provide the greatest opportunity to capture information on the demographics of the population being served, disaster reactions, and referrals needs. Therefore, the data collection reporting requirements for individual crisis counseling services are comprehensive.

#### Data collection on Individual Crisis Counseling includes:

- ✓ **Demographic data**
- ✓ **Disaster Reactions**
- ✓ **Referrals**

Crisis counselors are asked to report demographic information, disaster reactions, and referral needs on each disaster survivor who receives individual crisis counseling services. The information collected is used to ensure that services are reaching all of the impacted population and to record typical disaster reactions and record referrals made within the project and to other organizations and agencies.

### Individual Crisis Counseling Worksheet

The entire Individual Crisis Counseling Services Worksheet and the instructions on the back of the worksheet follow.

# [INSERT PROJECT TITLE]

## INDIVIDUAL CRISIS COUNSELING SERVICES

Employee ID: \_\_\_\_\_ Date: \_\_\_\_\_ Team: \_\_\_\_\_

Location/Neighborhood: \_\_\_\_\_

NAME AND ADDRESS, IF NEEDED:

### DEMOGRAPHIC INFORMATION

#### AGE (CHECK ONE)

- ☐ PRESCHOOL (0-5)
- ☐ CHILDHOOD (6-11)
- ☐ PREADOLESCENT/
- ☐ ADOLESCENT (12-17)
- ☐ ADULT
- ☐ OLDER ADULT

#### ETHNICITY

- ☐ WHITE
- ☐ HISPANIC ORIGIN
- ☐ BLACK
- ☐ AMERICAN INDIAN/ALASKA NATIVE
- ☐ ASIAN & PACIFIC ISLANDER
- ☐ MIDDLE EASTERN
- ☐ OTHER: \_\_\_\_\_
- ☐ DON'T KNOW

#### SEX

- ☐ MALE
- ☐ FEMALE

#### PREFERRED LANGUAGE

- ☐ ENGLISH
- ☐ SPANISH
- ☐ AMERICAN SIGN LANGUAGE
- ☐ OTHER: \_\_\_\_\_

### EVENT REACTIONS

#### BEHAVIORAL

- ☐ Extreme changes in activity level
- ☐ Excessive drug, alcohol, or prescription use
- ☐ Isolation/withdrawal
- ☐ Hyper-vigilance
- ☐ Reluctant to leave home
- ☐ Violent behavior
- ☐ Other: \_\_\_\_\_

#### EMOTIONAL

- ☐ Sadness, tearful
- ☐ Irritability, anger
- ☐ Feeling anxious, fearful
- ☐ Despair, hopeless
- ☐ Feelings of guilt or shame
- ☐ Feeling emotionally numb, disconnected
- ☐ Other: \_\_\_\_\_

#### PHYSICAL

- ☐ Headaches
- ☐ Stomach problems
- ☐ Difficulty falling or staying asleep
- ☐ Difficulty eating
- ☐ Worsening of chronic health conditions
- ☐ Fatigue/exhaustion
- ☐ Chronic agitation
- ☐ Other: \_\_\_\_\_

#### COGNITIVE

- ☐ Inability to accept/cope with death of loved one(s)
- ☐ Distressing dreams or nightmares
- ☐ Intrusive thoughts or images
- ☐ Difficulty concentrating
- ☐ Difficulty remembering things
- ☐ Difficulty making decisions
- ☐ Preoccupation with death/destruction
- ☐ Suicidal thoughts or feelings
- ☐ Other: \_\_\_\_\_

#### REFERRAL

- ☐ Within project (specify) \_\_\_\_\_
- ☐ Other disaster agencies
- ☐ Professional mental health services
- ☐ Substance abuse treatment
- ☐ Other community services
- ☐ Other: \_\_\_\_\_

#### Was the referral accepted by the individual?

- ☐ Yes
- ☐ No

#### OTHER KEY CHARACTERISTICS/EXPERIENCES

- ☐ Past or preexisting trauma or psychological problems or substance abuse problems
- ☐ Injured as a result of event
- ☐ At risk of losing life during event
- ☐ Loved one(s) missing or dead
- ☐ Coworker/friend(s) missing or dead
- ☐ Witnessed death or injury of others
- ☐ Displaced from home
- ☐ Displaced from or lost job
- ☐ Assisted with rescue/recovery
- ☐ Has physical disability that limits mobility/independence

#### NOTES:

- ☐ Permission given to be contacted again
- ☐ Declined to be contacted again
- 
- ☐ 1<sup>st</sup> Contact
- ☐ 2<sup>nd</sup> Contact
- ☐ 3<sup>rd</sup> Contact
- ☐ 4<sup>th</sup> or more contact

## **INSTRUCTIONS FOR THE INDIVIDUAL CRISIS COUNSELING FORM**

A contact is reported as an individual crisis counseling service if the outreach worker assists the disaster survivor to understand their current situation and reactions to the disaster and to review their options, and provides emotional support or referral services. During an individual crisis counseling service, the disaster survivor will generally share information regarding their disaster experience. The crisis counselor or outreach worker will gain insight into how the person is coping and may refer them to other services.

**Employee ID:** Enter the Employee ID of the outreach worker. The Employee ID is a unique identifier usually consisting of the first four letters of the individual's last name and four unique numbers such as the last four digits of the employee's social security number, telephone number, etc.

**Date:** Enter the date the Individual Crisis Counseling service was provided.

**Team:** Enter the name of the team that the outreach worker works with. Not all projects use a team structure, so leave space blank or enter N/A if this does not apply.

**Location/Neighborhood:** Enter the general location where the educational services were provided. This could be a public library, a church basement, or the Arlington Heights neighborhood.

**Age:** Check the appropriate box. The age used to differentiate a survivor as an "older adult" is determined by State policies and procedures.

**Ethnicity:** Multiple boxes or "other" box may be used if none of the categories apply. If ethnicity is unknown, mark the "don't know" box.

**Language:** Specify the disaster survivor's preferred language. Specify in the "notes" box if the disaster survivor would prefer that services be offered in a language other than English.

**Event Reactions:** Check the boxes that best describe the disaster victim's reactions as described by the disaster victim and observed by the crisis counseling worker. The four major categories of event reactions are behavioral, emotional, physical, and cognitive. Many disaster survivors may exhibit reactions in more than one category; mark all boxes that apply.

**Other Key Characteristics or Experiences:** These items may indicate how directly or indirectly an individual was impacted by the event; however, the outreach worker should be very sensitive to other reactions already stated or observed so as not to intensify reactions or "re-traumatize" an individual by having them recall too many details of their experience.

**Referrals:** State the type of referral made using the list on the bottom of the worksheet. If the referral fits into the "other" category, provide a brief explanation. If you will be referring the survivor to someone else in your project, provide additional information on the type of additional services that are needed. Your supervisor will provide specific instructions on how to complete this section. Additionally, please note whether the suggested referral was accepted by the disaster survivor.

**Notes:** This section is for your personal notes about the contact to help you remember information if there will be future contacts. You should also note if this is a first, second, third, or fourth contact, or more. This would be a good time to ask the individual if they would be open to another contact from you or another member of the project. If the answer is yes, you will need to collect the individual's name and set a location, date, and time to meet with them. If the answer is no, leave your contact information with them in case they change their mind.

## Group Crisis Counseling Services

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A group crisis counseling service objectives and outcomes that are similar to those of an individual crisis counseling session. The crisis counselor assists the disaster survivors to understand their current situation and reactions to the disaster and to review their options, and provides emotional support or referrals services. Disaster survivors will generally share information regarding their disaster experience during a group crisis counseling service. The members of the group assist each other to normalize their experiences. The crisis counselor will gain insight into both how each person and the group as a whole are coping. Education may be incorporated into the group crisis counseling service, but it not the main focus.

Group Crisis Counseling Services involve assisting or providing support groups meeting with citizens, working in classrooms with affected students, working with affected teachers and administrators after school, assisting people to understand their current situation and reactions and review their options, as well as addressing their emotional support and linking with other individuals and agencies who may provide assistance. Groups may be assisted by a mental health professional, a paraprofessional, or the group members themselves.

### Recording Contacts

The Group Crisis Counseling Worksheet includes a description of the type of group, the focus of the group session, plans for future sessions, and the number of participants. If more than one crisis counselor participates in a group session, the lead crisis counselor will count the session on the weekly tally sheet. This prevents groups from being counted twice in the data collection process, and it also reduces the paperwork burden on the staff. Group Crisis Counseling Information is reported on the group and not individual participants. Worksheets are a crisis counselor's personal notes. Only tally information on a separate worksheet will be submitted for data collection.

**Type of Group**—The description of the type of group is general, and the identity of the group should not be recorded. The narrative of the Federal quarterly and final reports will discuss the types of groups served. The data collection system only records the number of groups and participants.

TYPE OF GROUP	NUMBER OF PARTICIPANTS
School administrators	15

**Focus of Group Session**—The crisis counselor tracks the focus of each session and progress of the group in the “focus of group session” section. Additional notes can be written at the bottom of the page or on extra sheets. These notes will not be included in the data collection process.

**FOCUS OF GROUP SESSION:**

Support and coping after the death of a student and teacher.

**Plans for Future Sessions**—This section is helpful for planning and preparing for future sessions, especially if crisis counselors are leading multiple groups. (Again, these are the crisis counselor’s personal notes.)

**PLAN FOR FUTURE SESSIONS:**

Meet again in 2 weeks.

**Notes**—The notes section is to be used by the crisis counselor to capture additional personal and referral information. Project Managers may provide additional guidance on how to use the notes section.

**NOTES:**

Administrators are getting little guidance from school officials.

## **Additional Guidance**

Determining whether a service should be considered a group or individual crisis counseling service is determined by the way the group of people interacted with each other and the crisis counselor. The group should identify itself as a group with the purpose of working together to normalize its members' experiences in order to be considered a group crisis counseling session. There is one exception; CMHS requests that services provided to families in their homes be counted as individual crisis counseling services. It is important for the crisis counselor to record the demographic, disaster reactions, and referral information on the family members. For other group situations, the crisis counselor needs to determine whether it is considered a group or individual crisis counseling service based on the type of interaction with the group of people. Was the interaction a group process with a common focus or did individual disaster survivors receive services with other people present?

A separate Group Crisis Counseling Worksheet is completed for each group session. Demographic information is *not* collected on the individual participants. The Federal government is only interested in determining the number of groups conducted and the number of participants.

## **Group Crisis Counseling Worksheet**

A copy of the Group Crisis Counseling Services worksheet and the instruction on the back of the worksheet follows.

[INSERT PROJECT TITLE]

**GROUP CRISIS COUNSELING SERVICES**

Employee ID: \_\_\_\_\_ Date: \_\_\_\_\_ Team: \_\_\_\_\_

Location/Neighborhood: \_\_\_\_\_

TYPE OF GROUP	NUMBER OF PARTICIPANTS
FOCUS OF GROUP SESSION:	
PLAN FOR FUTURE SESSIONS:	
NOTES:	

## **INSTRUCTIONS FOR THE GROUP CRISIS COUNSELING FORM**

**Name:** Enter the Employee ID of the outreach worker(s)/facilitator(s). The Employee ID is a unique identifier usually consisting of the first four letters of the individual's last name and four unique numbers such as the last four digits of the employee's social security number, telephone number, etc. If two people are assisting the group, only one person fills out and submits a form.

**Date:** Enter the date the group met.

**Team:** Enter the name of the team that the outreach worker(s)/facilitator(s) work with. Not all projects use a team structure, so leave line blank or enter N/A if this does not apply.

**Location/Neighborhood:** Enter the general location where the group met. This could be a public library, a church basement, or the Arlington Heights neighborhood.

**Type of Group:** Enter the general makeup of the group. Is this a group of rescue workers? Senior Citizens? Women?

**Number of Participants:** Self-explanatory.

**Focus of Group Session:** Briefly describe the focus of the group session and the approach used by the crisis counselors (i.e., support, active listening, rap session).

**Plan for Future Sessions:** Note whether the group will be meeting again and, if so, when. Will this be a regularly scheduled group? If so, how often.

**Notes:** This is an area for the outreach worker(s)/facilitator(s) to jot a few notes that may help them recall the needs of the group if there are to be future sessions.



## Tally Worksheets

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At the end of the week, each team submits service data to the Project Manager. The Educational Services Worksheet serves both as a daily and weekly tally sheet of each team member's services for the week. Individual and Group Crisis Counseling Worksheets are personal notes of the crisis counselor. Therefore, each crisis counselor will tally his or her individual and group crisis counseling services for the week on a separate sheet. The following three tally sheets are offered as an example of how the data can be collected and totaled. The tally sheets may be modified to meet the needs of the project. For example, more lines may be needed to record all of the languages spoken.

Owing to the large amount of data captured on the Individual Crisis Counseling Services worksheet, the data collection database uses two separate tally sheets to enter the data, one for demographic data and another for reactions and referrals. The formats of the tally sheets are consistent with the data entry forms in the CCP Data Management System in order to make it easier for the staff responsible for data entry.

[INSERT PROJECT TITLE]

## INDIVIDUAL SERVICES TALLY SHEET FOR DEMOGRAPHIC DATA

Employee ID: \_\_\_\_\_ Date: \_\_\_\_\_ Team: \_\_\_\_\_

	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
<b>AGE</b>								
0-5 YEARS								
6-11 YEARS								
12-17 YEARS								
ADULT								
OLDER ADULT								
<b>ETHNICITY</b>								
WHITE								
HISPANIC ORIGIN								
BLACK								
AMERICAN INDIAN /ALASKAN NATIVE								
ASIAN & PACIFIC ISLANDER								
OTHER								
DON'T KNOW								
<b>LANGUAGE</b>								
ENGLISH								
SPANISH								
ASL								
<b>SEX</b>								
MALE								
FEMALE								
<b>CONTACTS</b>								
1 <sup>st</sup>								
2 <sup>nd</sup>								
3 <sup>rd</sup>								
4 <sup>th</sup> or More								
Yes to more contacts								
No to more contacts								

## **Instructions for the Individual Services Tally Sheet**

**Employee ID:** Enter the Employee ID of the outreach worker. The Employee ID is a unique identifier usually consisting of the first four letters of the individual's last name and four unique numbers such as the last four digits of the employee's social security number, telephone number, etc. The Team Leader or Project Manager will assign this number.

**Date:** Enter the date completion of this tally sheet was begun.

**Team:** Enter the name of the team that the outreach worker works with. Not all projects use a team structure, so leave line blank or enter N/A if this does not apply.

*Tallying your work for the week*—You should go through each of your Individual Services worksheets and count the number of children between the ages of 0-5 years you provided crisis counseling services to on Sunday, Monday, and so on. Do this for each of the categories on this sheet. Once you have entered totals for all categories for each day that you worked, you should then add the row together to obtain a total for the week. The data collection manager will enter a weekly total for each outreach worker.

[INSERT PROJECT TITLE]

**INDIVIDUAL SERVICES TALLY SHEET FOR  
REACTIONS AND REFERRALS**

Employee ID: \_\_\_\_\_ Date: \_\_\_\_\_ Team: \_\_\_\_\_

	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
<b>BEHAVIORAL</b>								
Excessive activity								
Drug, alcohol, prescription abuse								
Isolation								
Hypervigilance								
Reluctant go home								
Violent Behavior								
Other								
<b>EMOTIONAL</b>								
Sadness, tearful								
Irritability								
Anxious, fearful								
Despair								
Guilt, shame								
Numb, disconnected								
Other								
<b>PHYSICAL</b>								
Headaches								
Stomach problems								
Sleep problems								
Problems eating								
Worsening chronic illness								
Fatigue/exhaustion								
Chronic agitation								
Other								
<b>COGNITIVE</b>								
Inability to cope								
Distressing dreams								
Intrusive thoughts								
Lack of concentration								
Difficulty with decisions								
Preoccupation with death								
Suicidal thoughts								
Other								
<b>OTHER CHARACTERISTICS</b>								
Past or preexisting trauma								
Injured by event								
At risk of loss of life								
Loved ones missing or dead								
Coworker/friend missing or dead								
Witnessed death/injury of others								
Displaced from home								
Displaced from job								
Assisted with rescue/recovery								
Physical disability or limited mobility or independence								
<b>REFERRAL</b>								
Within project								
Other disaster agency								
Professional mental health								
Substance abuse								
Community services								
Other								
Referral accepted								
Referral declined								

## **Instructions for Individual Services Tally of Reactions**

**Employee ID:** Enter the Employee ID of the outreach worker. The Employee ID is a unique identifier usually consisting of the first four letters of the individual's last name and four unique numbers such as the last four digits of the employee's social security number, telephone number, etc. The Team Leader or Project Manager will assign this number.

**Date:** Enter the date completion of this worksheet was begun.

**Team:** Enter the name of the team that the outreach worker works with. Not all projects use a team structure, so leave line blank or enter N/A if this does not apply.

*Tallying your work for the week*—You should go through each of your Individual Services forms and count the number of people who experienced each type of reaction to the disaster, such as hypervigilance, difficulty sleeping and so on. Do this for each of the categories on this form. Once you have entered totals for all categories in each day that you worked, you should then add the row together to obtain a total for the week. The data collection manager will enter a weekly total for each outreach worker.

**[INSERT PROJECT TITLE]**

**GROUP SERVICES TALLY SHEET**

**Name(s):** \_\_\_\_\_ **Week:** \_\_\_\_\_ **Team:** \_\_\_\_\_

	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL
NUMBER OF GROUPS								
NUMBER OF PARTICIPANTS								

## Frequently Asked Questions

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The following are examples of questions that frequently arise in discussions about data collection and the proper way to record various types of contacts.

**Question:** I was handing out flyers and brochures at a community fair and someone asked me a few questions about the materials and the project. Which form should I use to document this contact?

**Answer:** This contact should be counted on the Educational Services form as a “brief, in person contact.”

**Question:** What if, in the example above, the person starts telling me how they are feeling and how they are coping with the disaster? Do I count it on both the Educational Services form *and* the Individual Crisis Counseling form?

**Answer:** No. Including the person on both forms would count the person twice and inflate the number of contacts made by a team and the project. The contact should be counted only on the Individual Crisis Counseling form.

**Question** On the Educational Services form, what is a telephone contact?

**Answer:** Often project staff will call organizations and businesses to inform them about the crisis counseling project’s activities. This is counted on the Educational Services form under telephone contact.

**Question:** What should I do, if when I’m talking to an organization on the telephone, they ask us to come out and give a presentation?

**Answer:** If you schedule an appointment to give a presentation when you are talking on the telephone with an organization, as in the example above, count the contact as a group educational service, not as a telephone contact. However, it should be counted on the date that you give the presentation, just in case it has to be rescheduled or canceled.

**Question:** If someone calls the project and asks us to give a presentation to their organization or group, do I count that as a telephone contact on the Educational Services form?

**Answer:** No. You would count this as a group educational service on the date that you deliver the presentation.

**Question:** If I give a presentation to a group of people and after the presentation several people come up to me and ask me more questions, do I count these contacts as in-person brief contacts on the Educational Services form in addition to counting the group educational service?

**Answer:** No. Those individuals are already included in your group participant total so there is no need to count them again.

**Question:** How do we count public service announcements (PSAs)?

**Answer:** PSAs can be counted under group educational services on the Educational Services form. The project staff can contact the television or radio station and ask for the average number of viewers or listeners for the time slot in which the PSA will air or the total number of viewers or listeners for the station if no information is available by time slot. However, the project should indicate what the total represents in their narrative reports (i.e., viewers for the time slot or all viewers of the station). For newspapers or magazines, you would use subscriber information. Please note that even if the PSA runs more than once, it should only be counted on the form once.

**Question:** An individual picked up one of our flyers and called our telephone number for information, but then they started telling me how they were feeling and coping so I talked to them to calm them down. Do I count that as a telephone contact?

**Answer:** No. This conversation should be counted as an Individual Crisis Counseling service. On the Individual Crisis Counseling Service form, in the location/neighborhood space, write “telephone.” Then fill out the rest of the form following the usual procedures.

**Question:** Which form should I use if I meet with a family?

**Answer:** The Individual Crisis Counseling Form. The project may either complete one form for each family member present, or, instead of placing the checks in the boxes, they can place numbers to represent the number of family members who are male, for instance. If there is only one member actively participating, then the outreach worker may only fill out one form for that member. For instance, if the children are present but not participating or paying close attention but the mother is talking, the outreach worker would fill out a form only for the mother.



# DATA PROCESSING

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The CCP Data Management System is a database file developed using Microsoft Access 2000 for Windows. The database is used to enter data collected from data collection worksheets and to generate reports. Training in Microsoft Access is not required to use the CCP Data Management System, but is recommended if the State Mental Health Authority or local providers wish to modify the database in order to capture additional information not required by the Federal government.

The CCP Data Management System is in compliance with the Privacy Act. It does not record names or any other personal information on either workers or disaster survivors. The only information entered into the database is the Disaster Number and the data totals from the tally sheets, described in the section on data collection. Reports are generated automatically and can be printed at any time. These reports fulfill the Federal requirement that statistics on services and demographics be submitted with quarterly and final reports. Additional narrative information will be required. For more information on reporting requirements, contact the Emergency and Disaster Relief Branch of CMHS.

The best way to learn how to use the CCP Data Management System is to open the sample file provided and practice navigating between data entry screens and reports.

Two files are contained in the diskettes that accompany this tool kit:

- **CCP** is the master file. Project staff should copy the CCP file and use it to establish a database file for each CCP grant.
- **CCP Sample** is a sample file project designed to help staff learn how to manipulate the database.

Copies of the switchboards, forms, and reports used within the CCP Data Management System are provided in this section. It is recommended that project staff open the CCP Sample database file and practice navigating within the file while reading this section.

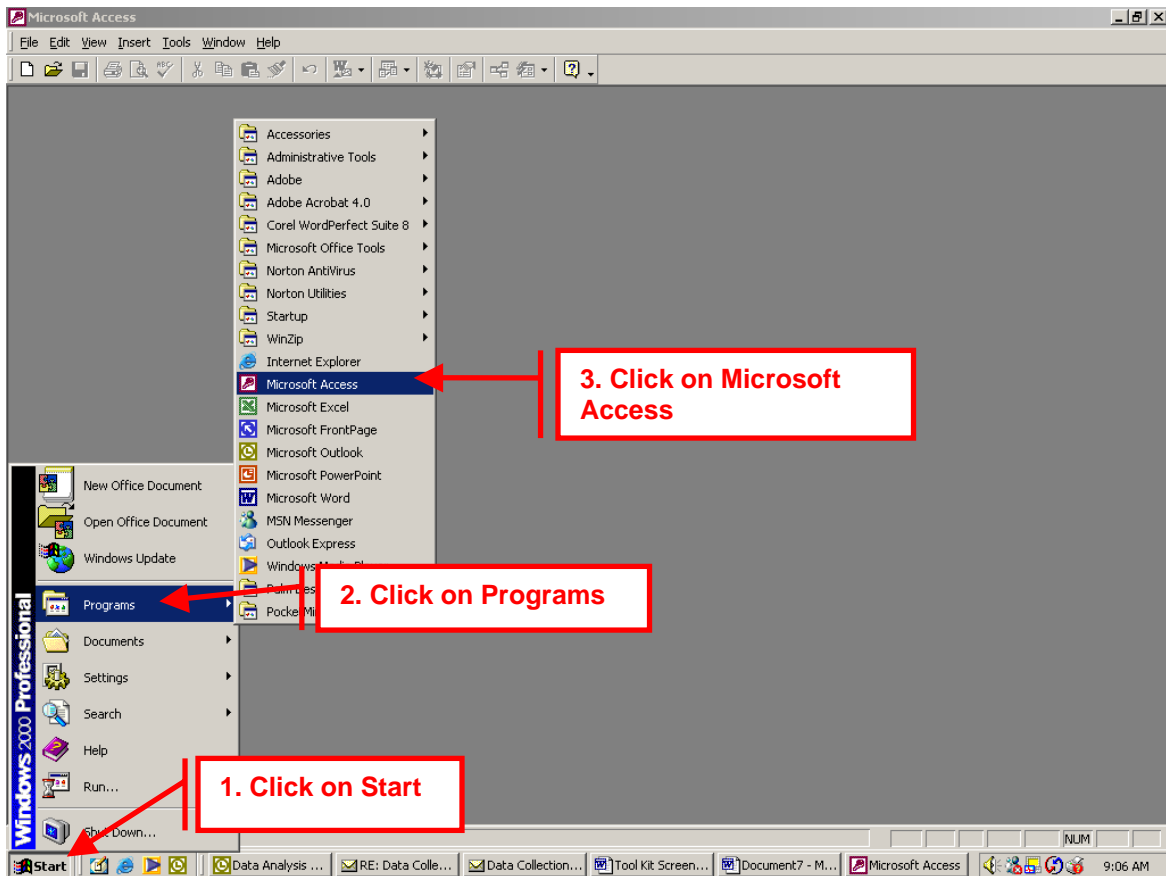
# Getting Started

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## Open Microsoft Access

In the instructions that follow, click with the left mouse button unless the directions specify the right mouse button. From a Windows environment:

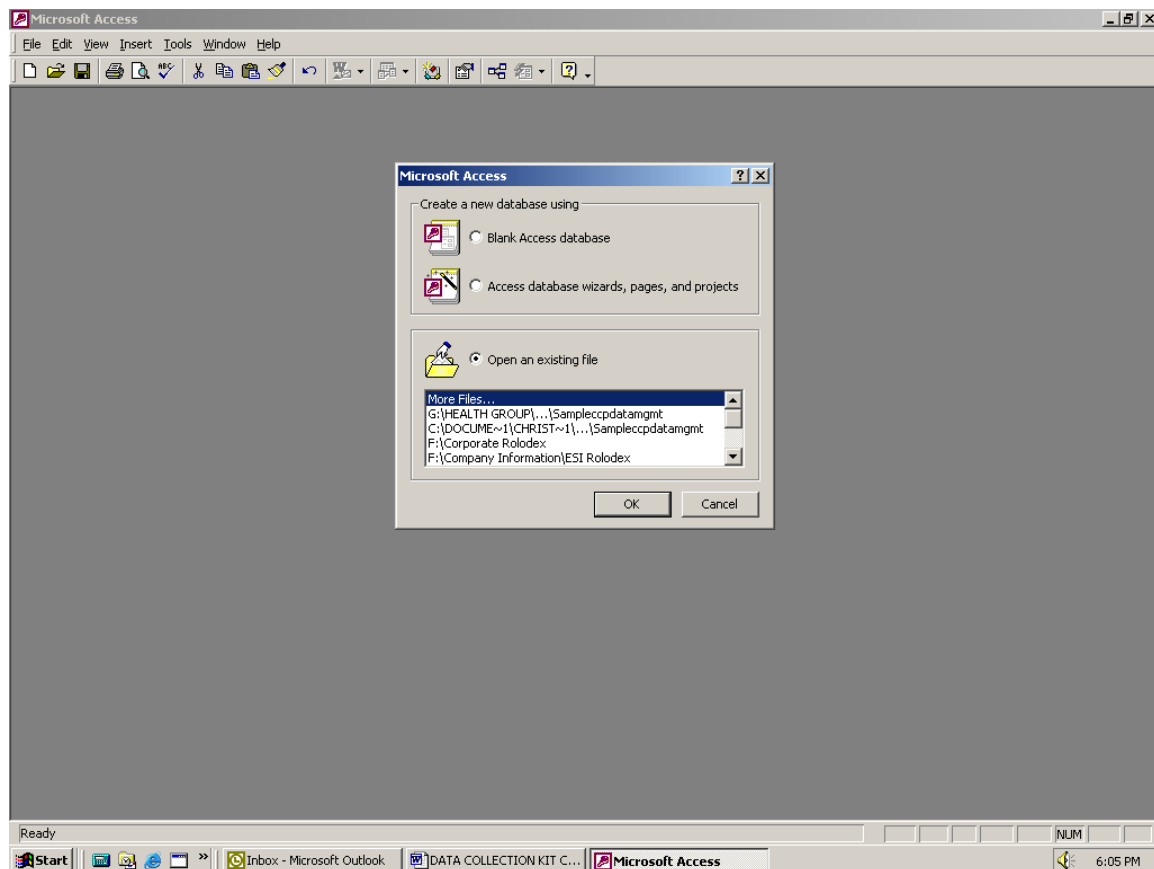
1. Click on Start.
2. Click on Programs.
3. Click on Microsoft Access.



## Open the CCP Data Management System Database

A window, prompting you to choose between creating a new file and opening an existing file, will automatically appear.

- Double click on “CCPpdatamgmt” to open the file, or, highlight the file by clicking once on the file then click on “OK”. (The “CCPpdatamgmt” file may be loaded on your computer, zip drive, network, CD, or diskette.) On the screen capture below, the text box and arrow point to a copy of the database that is loaded on the “C:” drive. Files that are not located on the hard drive (“C:” for most computers) will begin with a letter followed by a colon; the letter indicates the drive where the file is located.

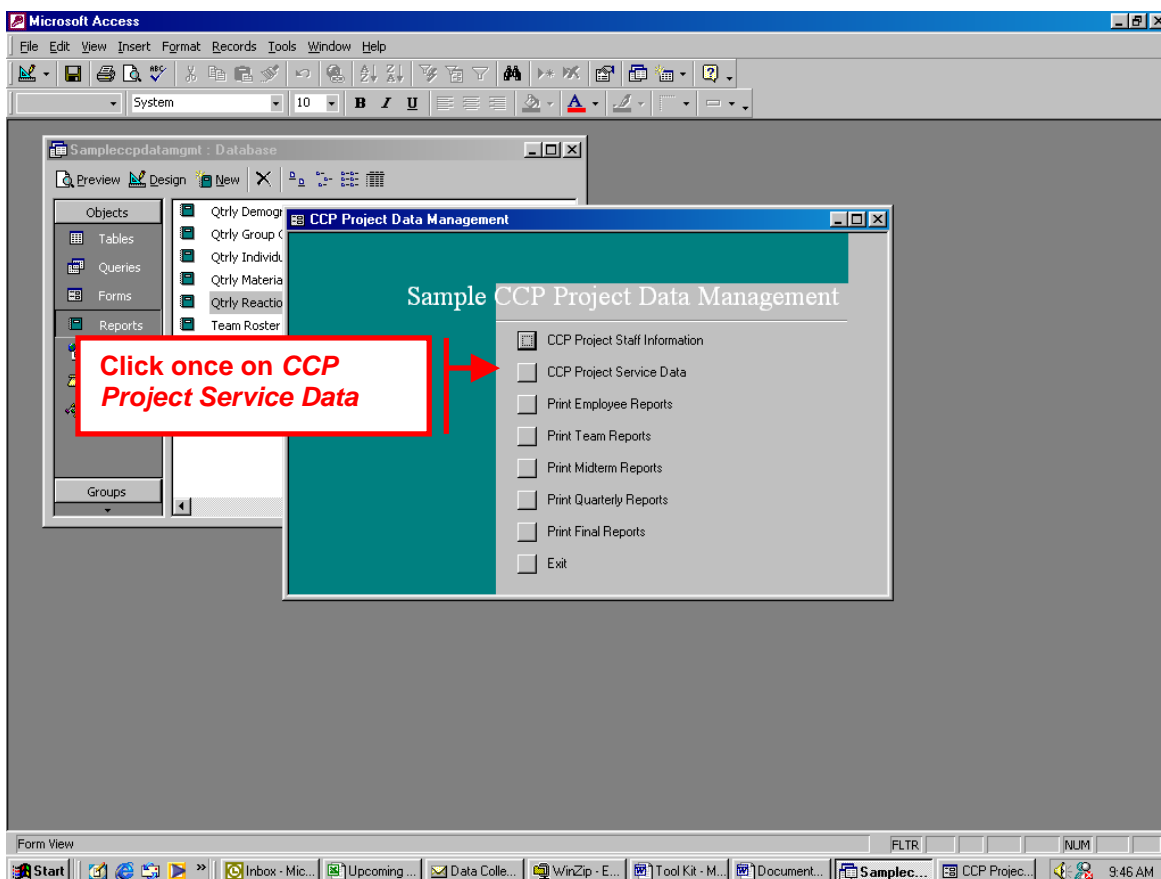


## Navigating with Switchboards

### Access the Data Entry Function

When the “CCPpdatamgmt” file is opened, a main switchboard will appear. A switchboard is a startup window that helps you navigate around the database file. The CCP Data Management System has two functions: data entry and reports. Either function can be accessed through the main switchboard. This section of the tool kit deals with data entry; the next section deals with reports.

- Click once on the CCP Project Service Data toggle button indicated by the text box and red arrow:



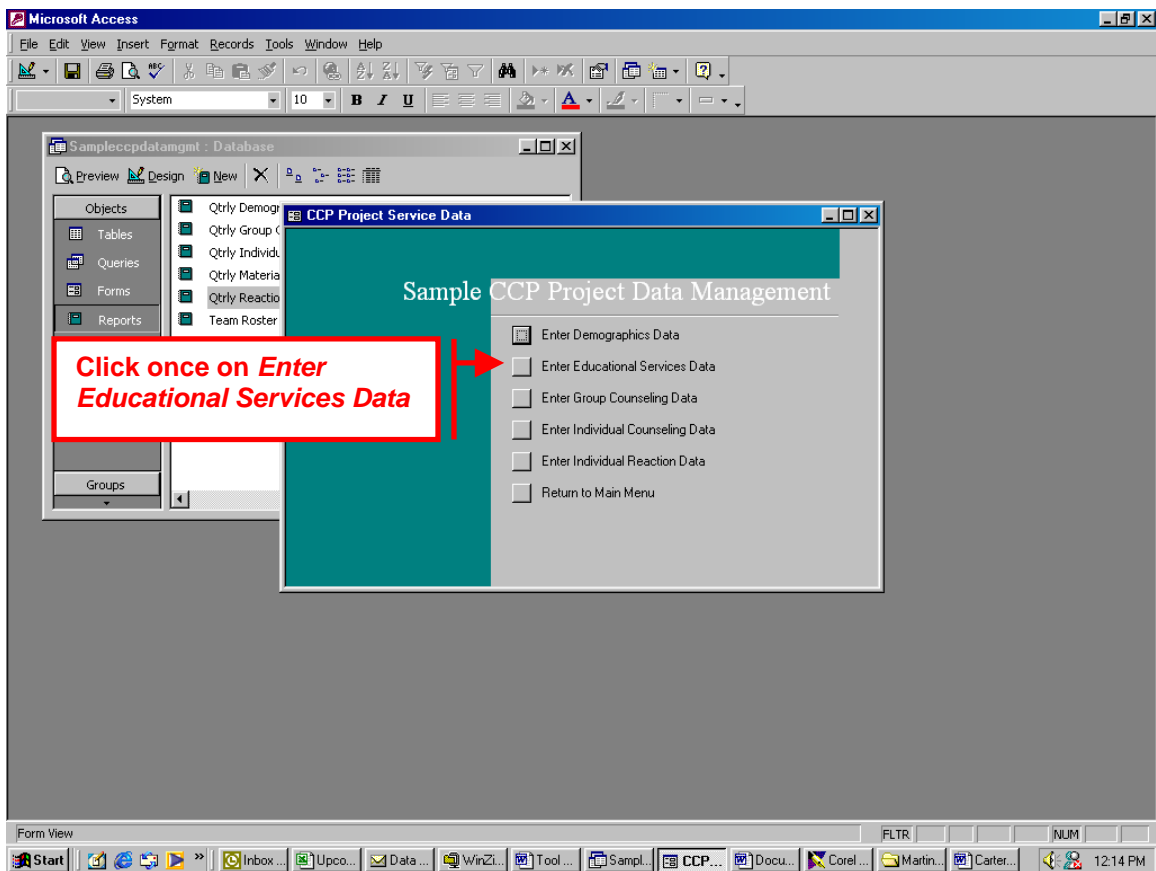
## Select Data Entry Form

A second switchboard will open, allowing you to select one of four data entry forms:

- Demographics Data
  - Educational Services Data
  - Group Counseling Data
  - Individual Counseling Data
  - Individual Reaction Data
- (A sixth toggle button allows you to return to the main switchboard.)

Each of the five forms corresponds to one of the tally sheets discussed in the previous section on data collection.

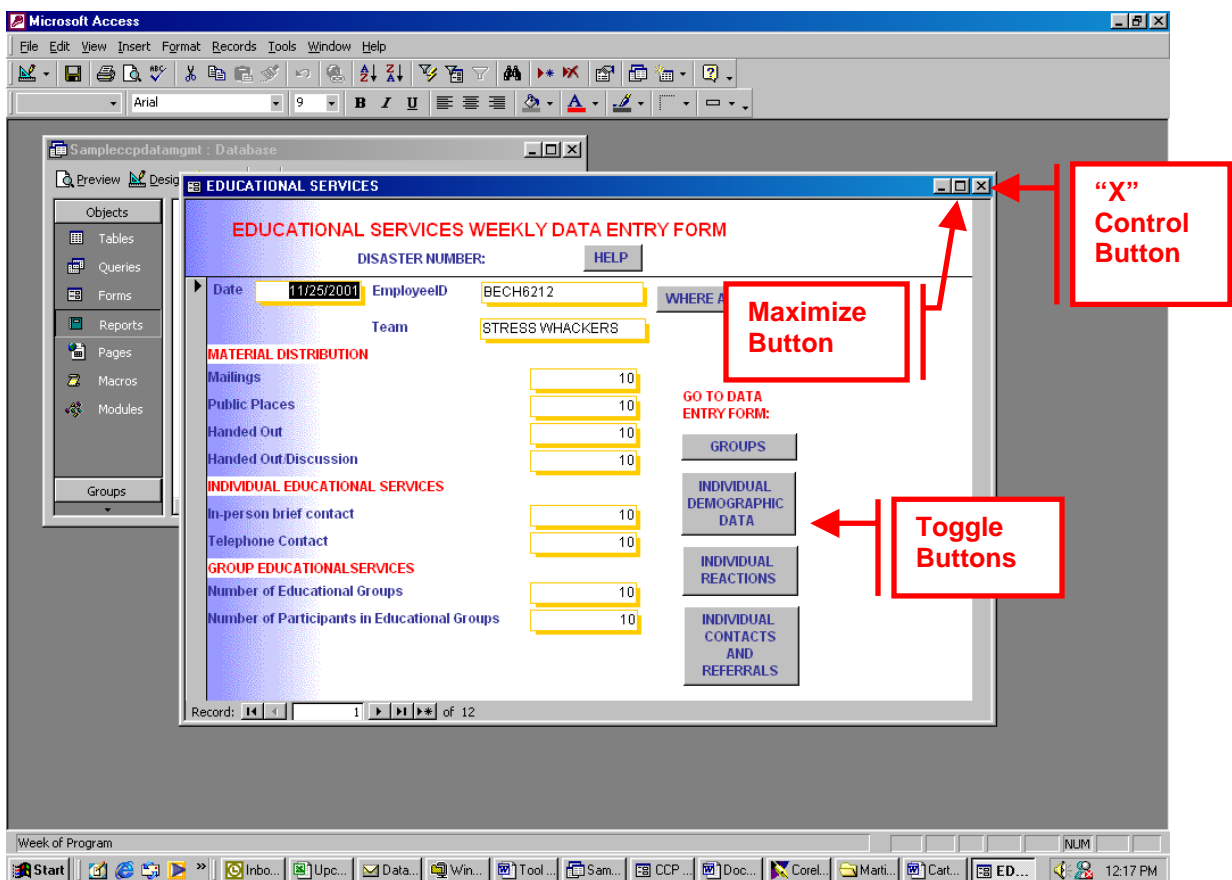
- Select the Educational Services data entry form by clicking on the appropriate toggle button, indicated by the text box and red arrow.



## Moving Between Forms

Moving from one form to another is easy.

1. Click on the toggle button for any of the other forms. Move from form to form without returning to the switchboard.
2. To return to the switchboard, click on the “x” control button (“x” in the upper right hand corner of the window. This control button closes the screen.
3. If more than one form is open the “x” control button must be clicked on each form to close it in order to return to the switchboard.
4. To enlarge the form, click on the maximize button located just to the left of the “x” control button.

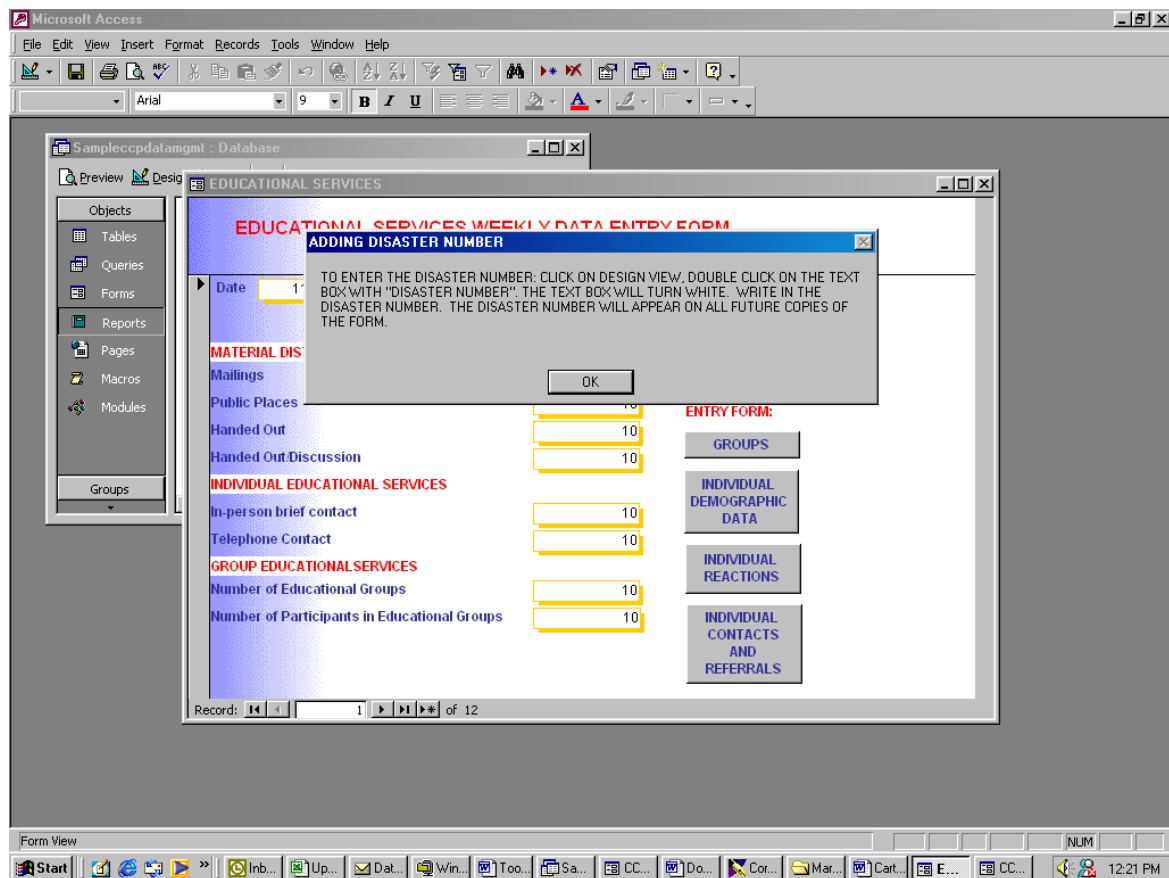


# Setting Up Your CCP Data Management System

## Entering Your Disaster Number

Now that you know how to move around the data entry forms, the first step to setting up your CCP Data Management System is to enter the Disaster Number. Adding the Disaster Number is especially important if the State in which you are working has frequent disasters and therefore may be running more than one disaster program at a time.

1. Click once on the **Help** button to the right of the Disaster Number on any of the four data entry forms. The message box displayed in the screen capture below will appear.

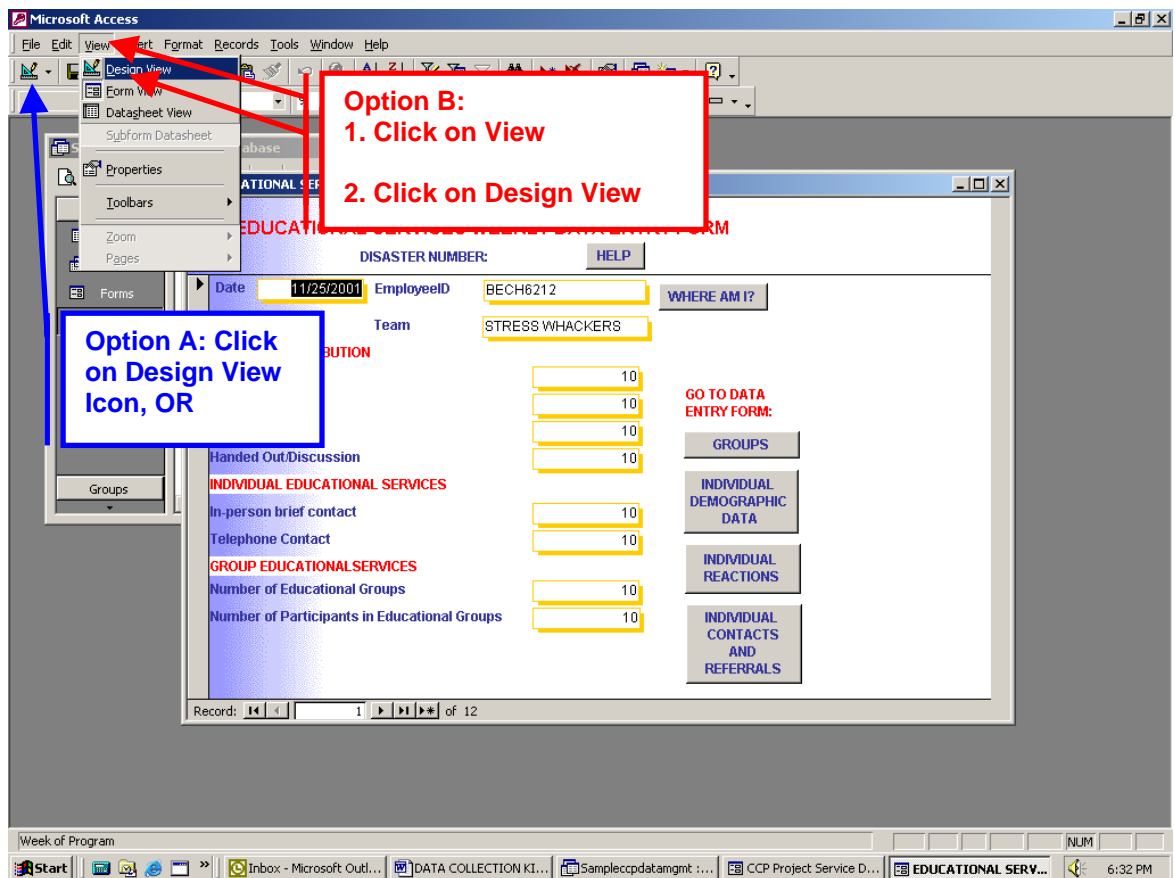


## Entering Your Disaster Number

The message provides instruction on how to add the Disaster Number. The Disaster Number is added in Design View, which gives you control over all of the data fields in the form. Changes made in Design View remain on the form during all future data entries.

To access Design View, click on the Design View icon to the far left on the tool bar at the top of the form, indicated by the blue text box and arrow below. If the tool bar is closed and the Design View icon is not visible, you can access the Design View by following the steps below, indicated by the red text boxes and arrows.

1. Click on View
2. Click on Design View

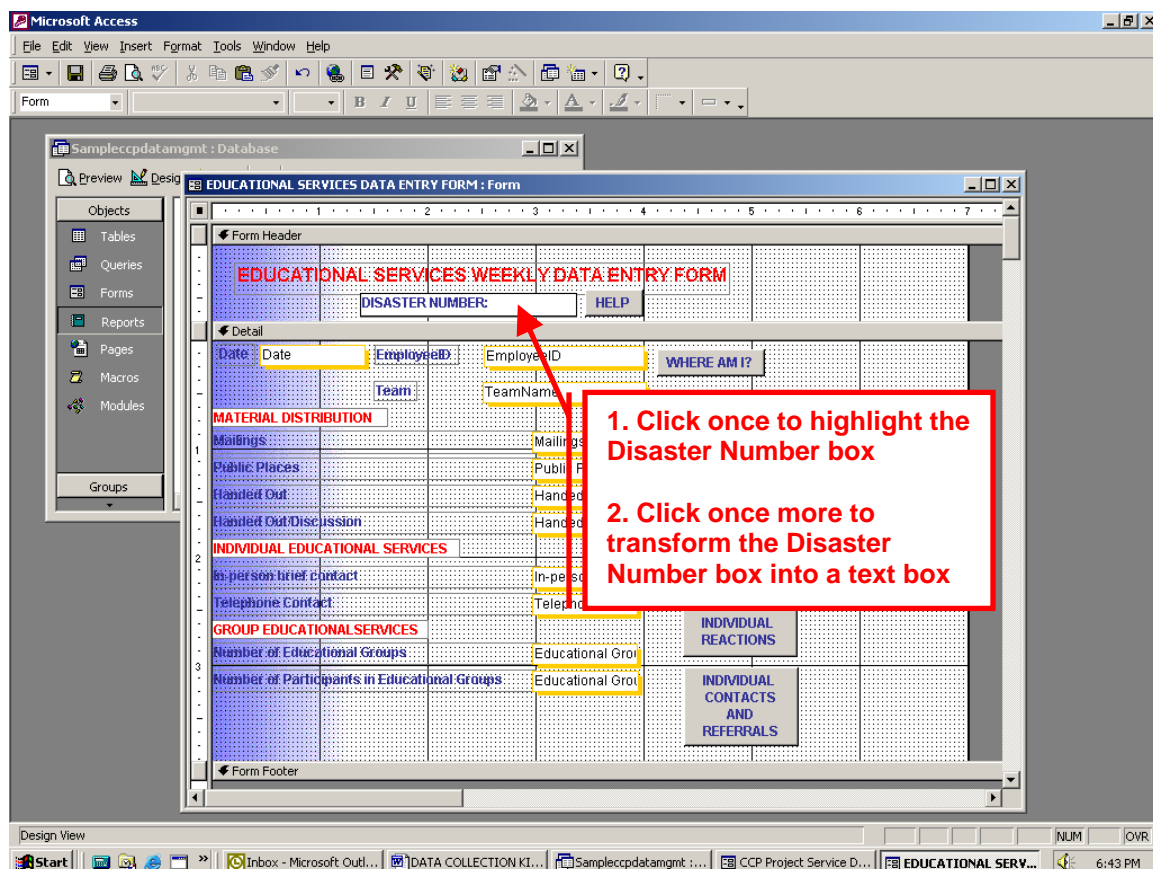




## Entering Your Disaster Number

Notice how the Educational Services Form changed after you selected Design View. You can now see the grid, the field text, and the data boxes. Once the form is in Design View, the Disaster Number can be inserted as follows

1. Highlight the “Disaster Number” box by clicking on it once. When it is highlighted, click on the box once more. The box will turn white, as shown in the following screen capture. The white box is a text box; you can type in numbers or letters.
2. When you are satisfied with your entry, click on the “x” control button in the upper right-hand corner of the form. A message will appear, asking if you wish to save these changes. If you are satisfied with your changes click on yes; if not, click no or cancel. After you click on yes, you will be returned to the Data Entry switchboard and can make the same change to each of the other forms, following the instructions on the previous pages.
3. After the Disaster Number is entered on each form through Design View, every time you open a form the Disaster Number will automatically be entered. You are now ready to start entering data.



## Creating New Records

A new record is ready to be created each time you open the CCP Data Management System and select a data entry form.

1. Enter data in each of the fields by clicking on the appropriate field (blank box) with the mouse or using the Tab key to move between fields. Type the numbers in the field; do not use commas. Fields left blank will default to zero.
2. Each record is numbered, beginning with “1”. The records that have been entered may be reviewed and edited by using the black arrows on either side of the record number to change the record number. Changing the record number will permit you to move forward and backward through all of the records you have entered since you last opened the file. Records that were previously entered are not accessed here; these records may be accessed using the database window.

The screenshot displays the 'EDUCATIONAL SERVICES WEEKLY DATA ENTRY FORM' in Microsoft Access. The form is titled 'EDUCATIONAL SERVICES WEEKLY DATA ENTRY FORM' and includes a 'DISASTER NUMBER: 12345' field and a 'HELP' button. The form is divided into several sections: 'Date' (11/25/2001), 'EmployeeID' (BECH6212), 'Team' (STRESS WHACKERS), 'MATERIAL DISTRIBUTION', 'INDIVIDUAL EDUCATIONAL SERVICES', and 'GROUP EDUCATIONAL SERVICES'. Each section contains input fields for numerical data. A red box labeled 'Record Number' points to the 'Record' field at the bottom of the form, which shows '1' of 12. The form also includes a 'GO TO DATA ENTRY FORM:' button and a 'GROUPS' button. The status bar at the bottom indicates 'Material handed out with no further interaction' and shows the time as 7:10 PM.

Section	Field	Value
MATERIAL DISTRIBUTION	Mailings	15
	Public Places	10
	Handed Out	10
	Handed Out/Discussion	10
INDIVIDUAL EDUCATIONAL SERVICES	In-person brief contact	10
	Telephone Contact	10
	Number of Educational Groups	10
GROUP EDUCATIONAL SERVICES	Number of Participants in Educational Groups	10

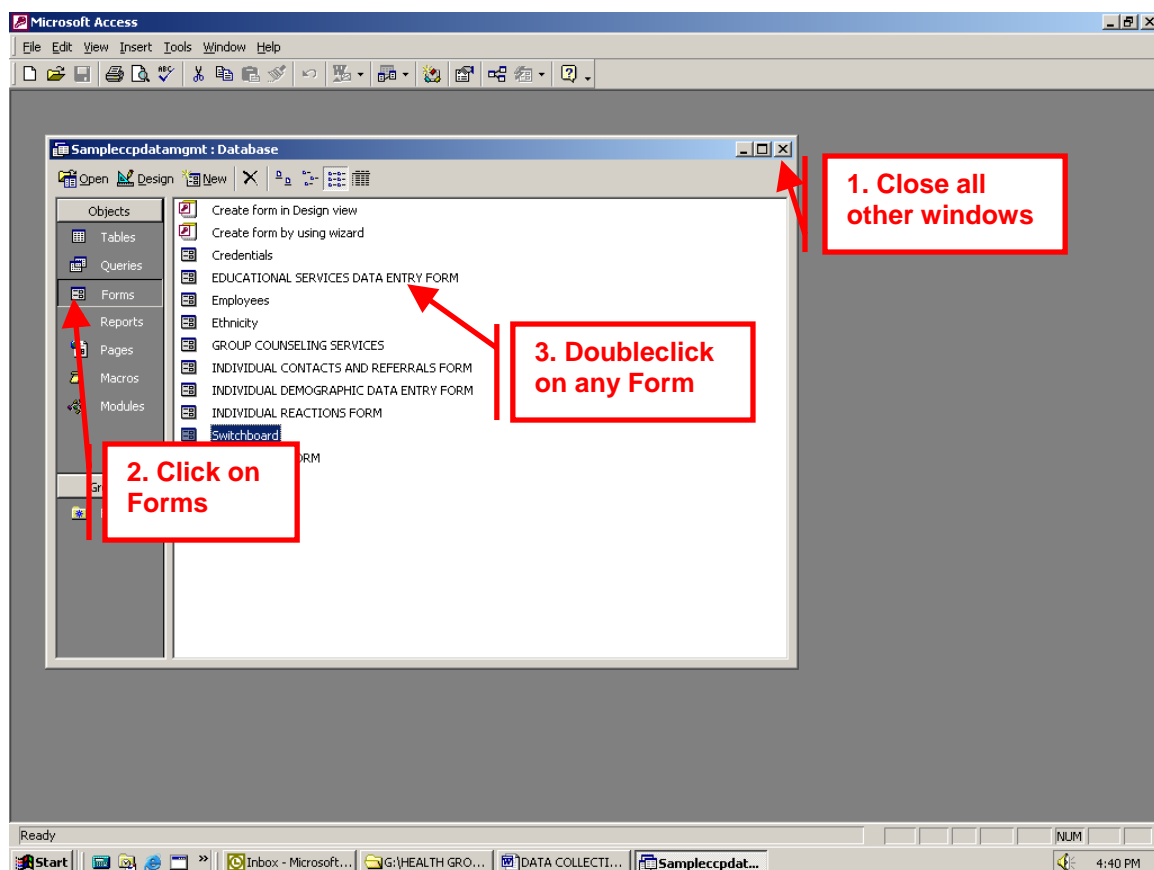
# Accessing the Database Window

## Reviewing Records

Behind all of the open switchboards and forms is the database window, which gives you access to everything in the database as well as tools to change or create new items. Not only is the database window helpful for managing records, you will need to use the database window if you want to review all of the records in the database or delete one or more records.

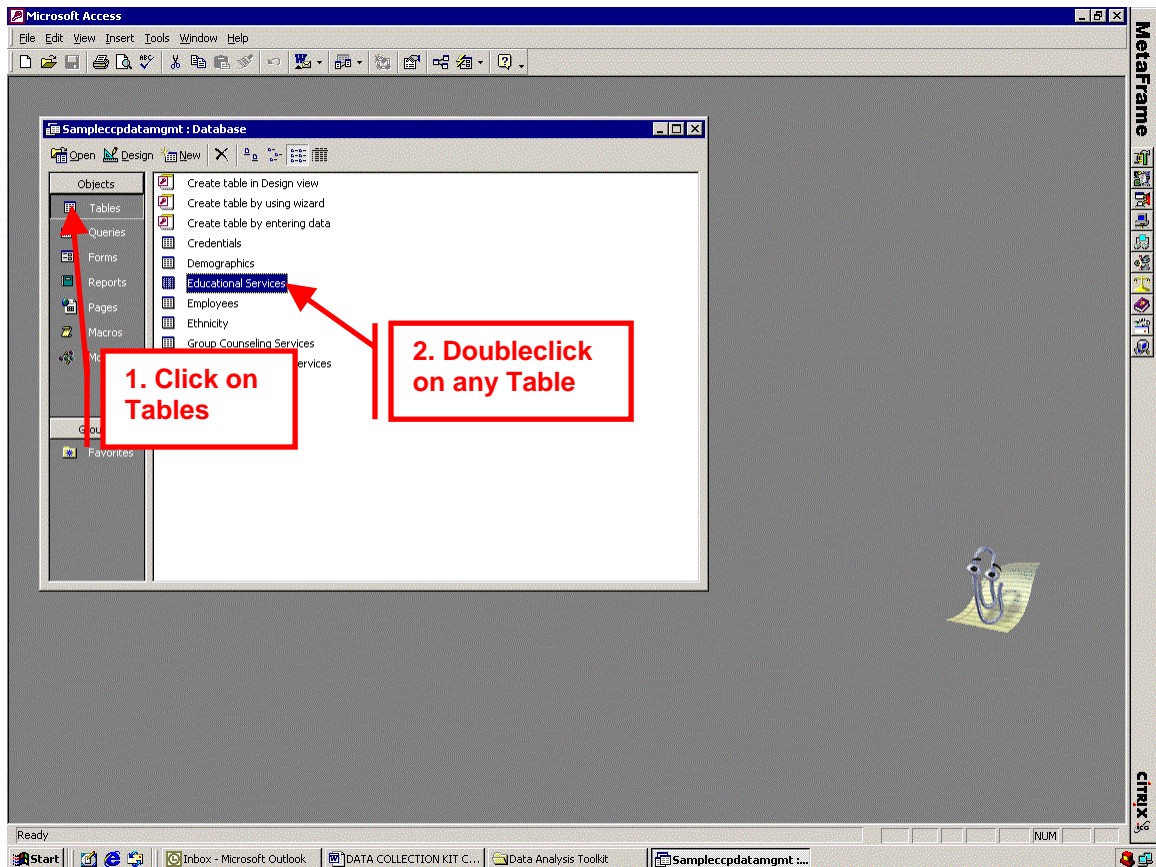
All of the records previously entered into the database can be accessed and reviewed by doing the following. Close all open forms or switchboards that are open by using the “x” control button, starting with the lowest window; otherwise, you may accidentally close the Access file. If you *do* accidentally close the Access file, *don't panic!* Access has an automatic save feature.

1. Click on the “x” control button to close any forms or switchboards that are open. Always close the lowest window; otherwise, you may accidentally close the Access file.
2. Click on the Forms icon, which you will find listed under Objects.
3. Doubleclick on the form of your choice. The sample below highlights the Educational Services form, but you may open any of the forms.
4. You will now be able to move through all of the records using the black arrows at the bottom of the screen to change the record number. You may also make changes to any of the records.



## Deleting Records

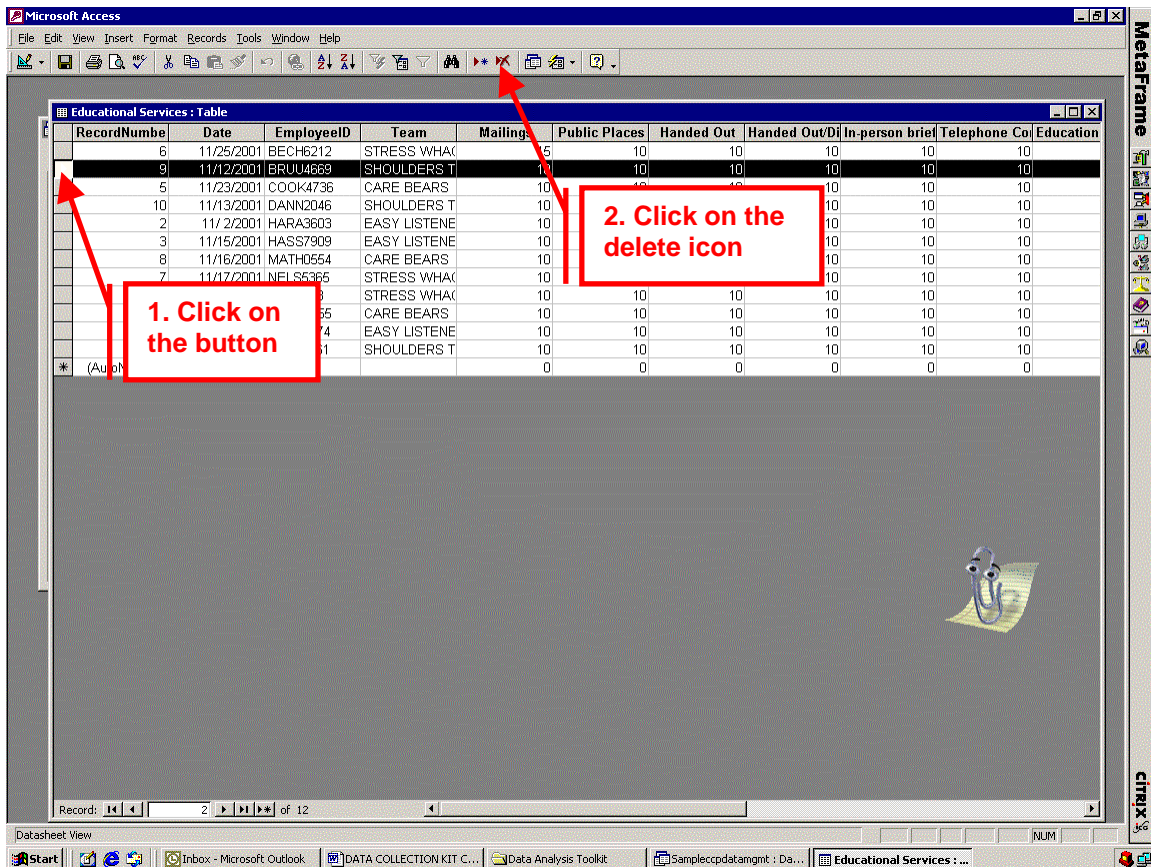
1. The easiest way to delete one or more records is to click on the Tables icon (listed under Objects) from the Database window.
2. Click on the appropriate table, which stores all of the data you have been entering.



## Deleting Records

1. Click on the button next to the record you want to delete.
2. Click on the delete icon on the tool bar.
3. When you close the table by clicking on the “x” control button, you will be asked if you want to save your changes. If you click yes, the record will be permanently deleted and cannot be retrieved.

*Be careful not to delete the row of fields.*



## Review of Data Entry

Let's review the basic steps to entering data:

1. Open the appropriate form using the data entry switchboard.
2. Enter the data from the weekly tally sheets for each team that correspond to each data entry form. (Remember that you are entering *Team* data, not individual crisis counselor data.)
3. When you have finished entering the data, close each window using the x control button in the upper right-hand corner of the form.
4. Data should be entered on a weekly basis for each Team.
5. The next section contains detail on the various reports that are generated by the CCP Database file.

# REPORTING

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This section discusses the two different reporting formats—numerical and narrative—and the requirements/benefits of each. The numerical reports capture the actual numbers of individuals and groups served and the types of services they received and make possible the development of statewide and national statistics on counseling service needs following disasters. Narrative reports focus on what the numerical reports are actually indicating—the severity of the effects on the population in the disaster area, any unexpected problems revealed, overall conclusions that can be drawn from the numerical data, a need for additional foreign language speakers, etc. Together, the two types of reports provide far more information than either the numerical or narrative reports can alone.

## Reporting Tips

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The numerical reports generated by the database discussed in this toolkit fulfill the Federal requirement that statistics on services and demographics be submitted with quarterly and final reports. The data recorded on the worksheets meet the basic Federal requirements for collecting numeric data on CCP services. However, the State also will be required to submit quarterly narrative reports in support of the numerical data.

The State or local mental health authorities may elect to collect additional data, if needed for program oversight and management. For example, the State may want to know how many children under 14 are receiving individual counseling. All of the data collection worksheets may be modified to include additional information required by the State or local authorities.

Although recognizing that some disaster survivors have special needs, the Crisis Counseling Program, from its inception, has focused on serving people who are responding normally to an abnormal experience. The narrative report prepared by the State Mental Health Authority can assess the key indicators of disaster stress, as revealed by the numerical reports, and indicate whether the crisis counseling services being provided are adequately serving the geographic, social, cultural, ethnic, and special populations they are designed to help. Using the data from the numerical reports, the narrative can also provide answers to a number of important questions. For example:

- At what stage is the community in the recovery process?
- Is more staff required to meet the needs of the community?
- Are the necessary foreign language skills needed to serve the community available within the crisis counseling staff? If not, what specific additional language skills are needed?
- Is the population that needs crisis counseling services larger—or smaller—than anticipated? (This information is needed for the next stage of grant administration.)
- Did the procedures indicated in the toolkit meet the needs of the disaster survivors as encountered by the crisis counselors, or did they need modification? If the procedures were modified, how were they changed and why?

Answers to these questions, together with the numerical reports, will help the States, FEMA, and CMHS allocate resources to meet the crisis counseling needs of survivors of future large-scale disasters more efficiently and enable these organizations to modify procedures, if necessary, to focus their crisis counseling efforts more effectively.

## Generating Reports

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The number and variety of categories or fields of data collected and processed are too large to generate a single report that includes all of the information and can be printed on standard size paper. Therefore, separate reports are generated for the different categories within the types of services. As data are entered into the system through the data entry forms, these reports are completed automatically. The CCP Project Manager may forward a copy of the file either by electronic mail or diskette or may print the reports and submit hardcopies.

As with data entry, switchboards are used to help the user navigate between the various reports. The best way to become familiar with the CCP Data Management System reports is to use the CCP Sample file. Most of the reports are designed in tabular format, with automatic totals for each column at the end of the report. Tabular format allows the data for multiple weeks to be displayed on one page. The reports display data differently than the data entry forms in order to make the information easier to review and interpret. Each of the demographic categories is displayed on a separate page. The 27 reports are as follows:

- **Employee Reports**
  - Group Counseling
  - Group Education
  - Individual Counseling
  - Individual Referrals
  - Material Distribution
- **Team Reports**
  - Age and Gender
  - Ethnicity and Language
  - Group Counseling
  - Group Education
  - Individual Counseling
  - Individual Referrals
  - Material Distribution
- **Midterm Reports**
  - Demographics
  - Educational Services
  - Group Counseling
  - Individual Contacts and Referrals
  - Individual Reactions
- **Quarterly Reports**
  - Demographics
  - Educational Services
  - Group Counseling
  - Individual Contacts and Referrals
  - Individual Reactions
- **Final Reports**
  - Demographics
  - Educational Services
  - Group Counseling
  - Individual Contacts and Referrals
  - Individual Reactions

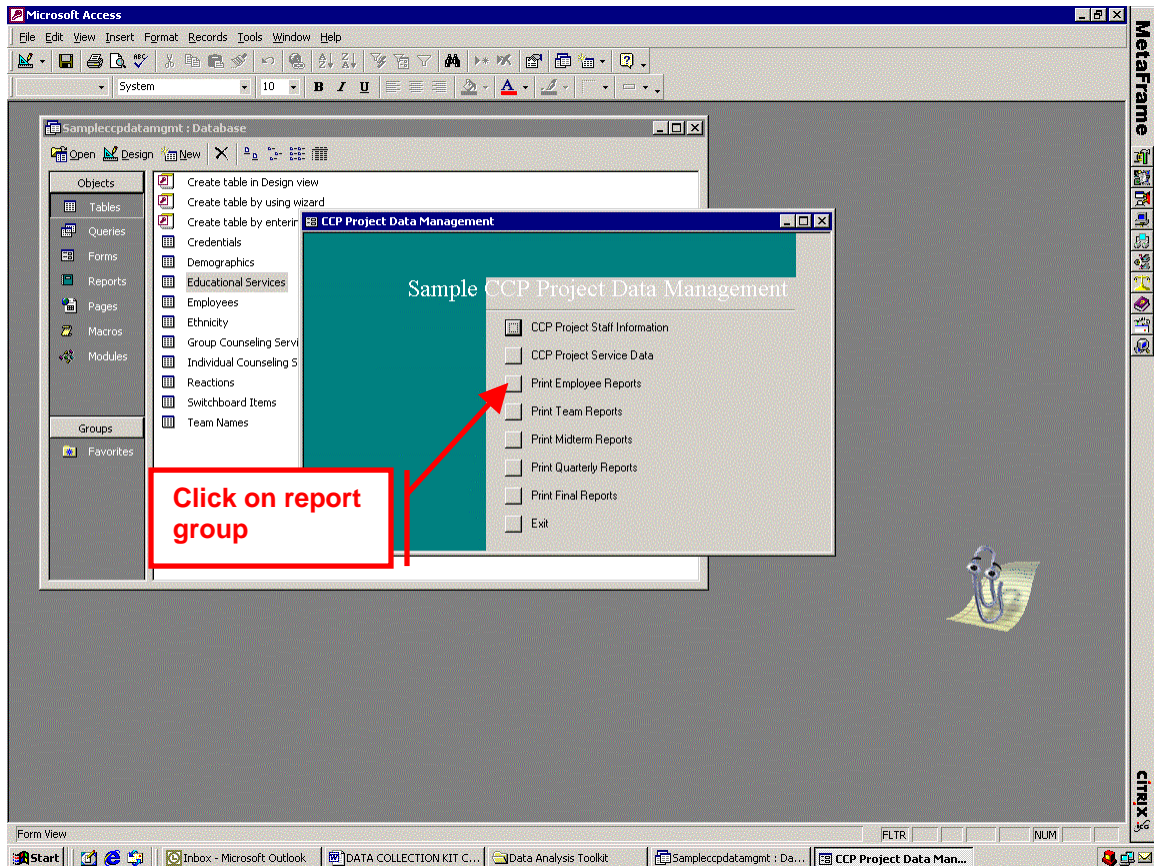


## Opening a Report

Open Microsoft Access and the CCP Data Management System by following the steps outlined on pages 28-29. The CCP Sample database file will open to the main switchboard. Toggle buttons for the following report groups will be displayed.

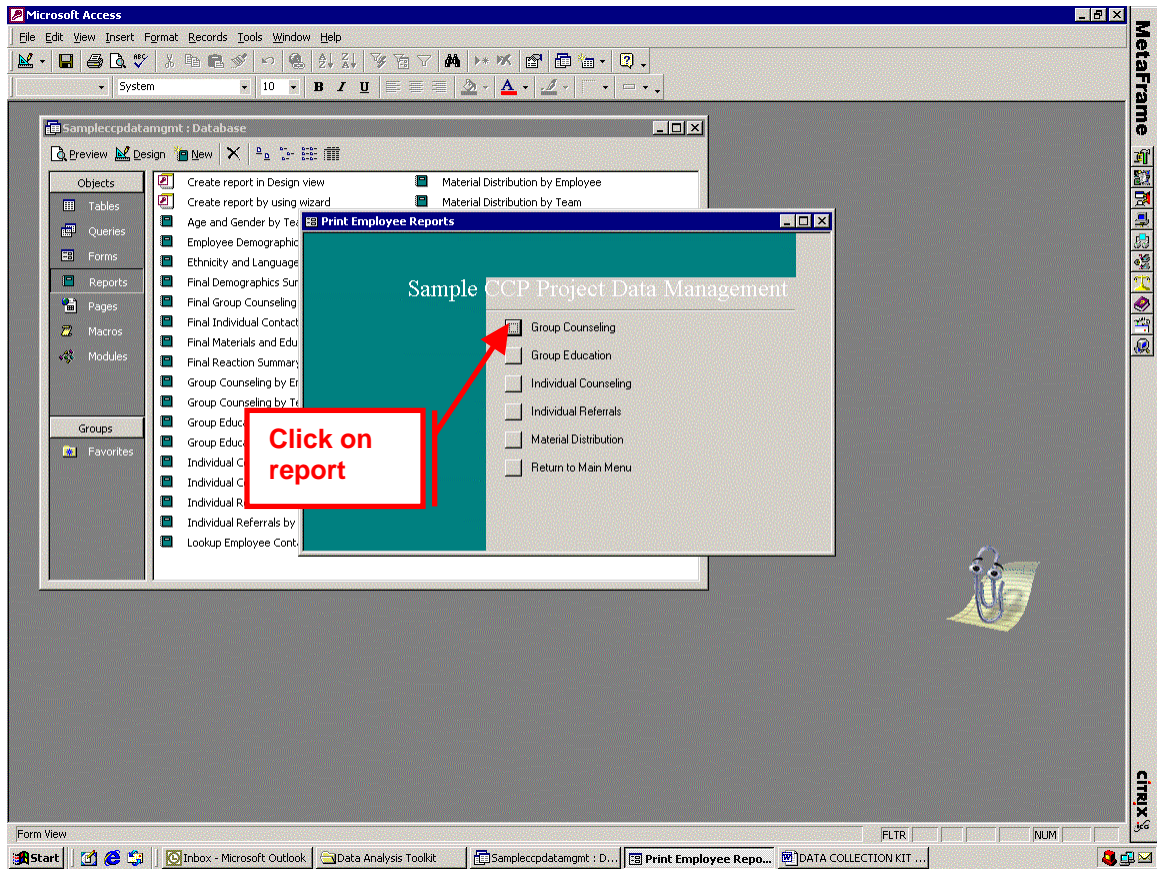
To open a report:

- Click on the toggle button for any report group. The following example leads to opening the Employee—Group Counseling Report.



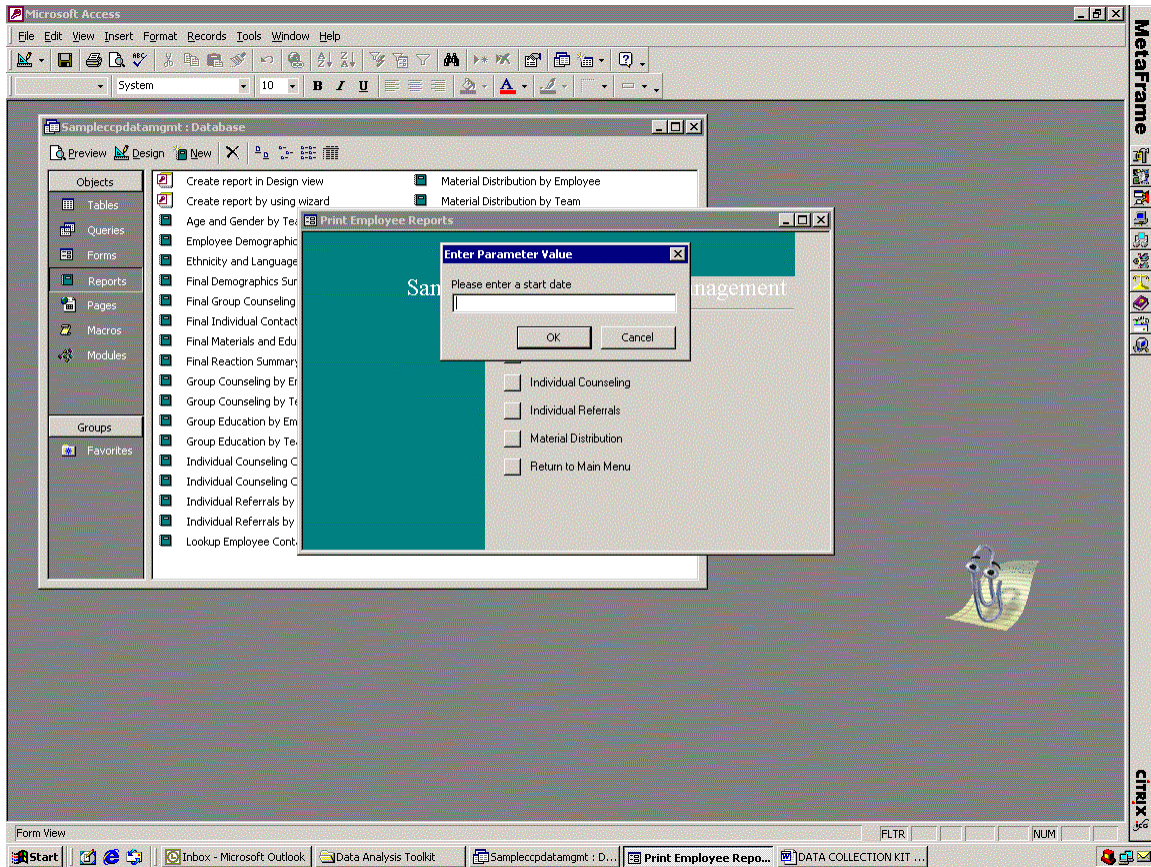
## Opening a Report

- Click on the toggle button for any report individual report.



## Opening a Report

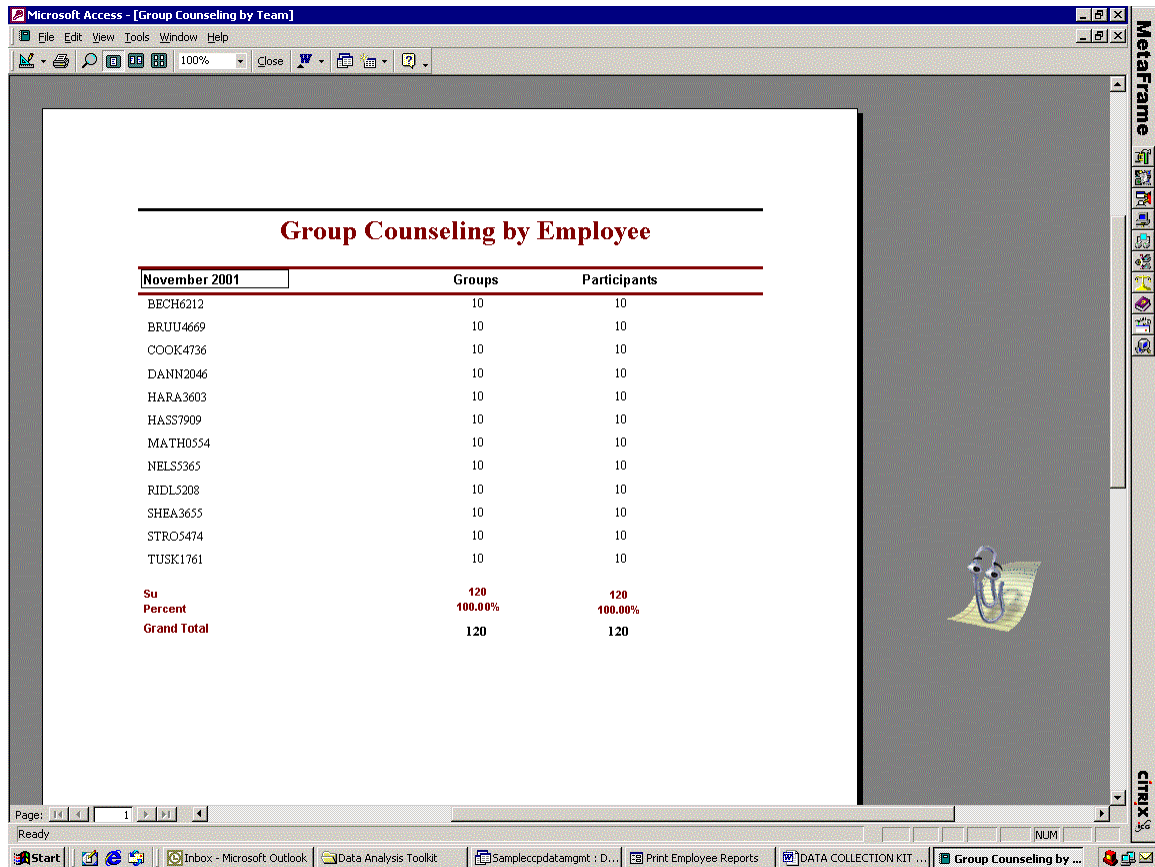
A series of windows will appear, prompting you to enter 1) report start date, 2) report end date and 3) employee name. The last window will prompt you for information that directly applies to the type of report you are printing. For example, if you are printing a team-based report, you will be asked to enter the team name.



## Opening a Report

To maximize the size of the report on the screen, click on the maximize control button, which is located in the upper right-hand corner of the screen just to the left of the x control button.

The following report will be displayed:



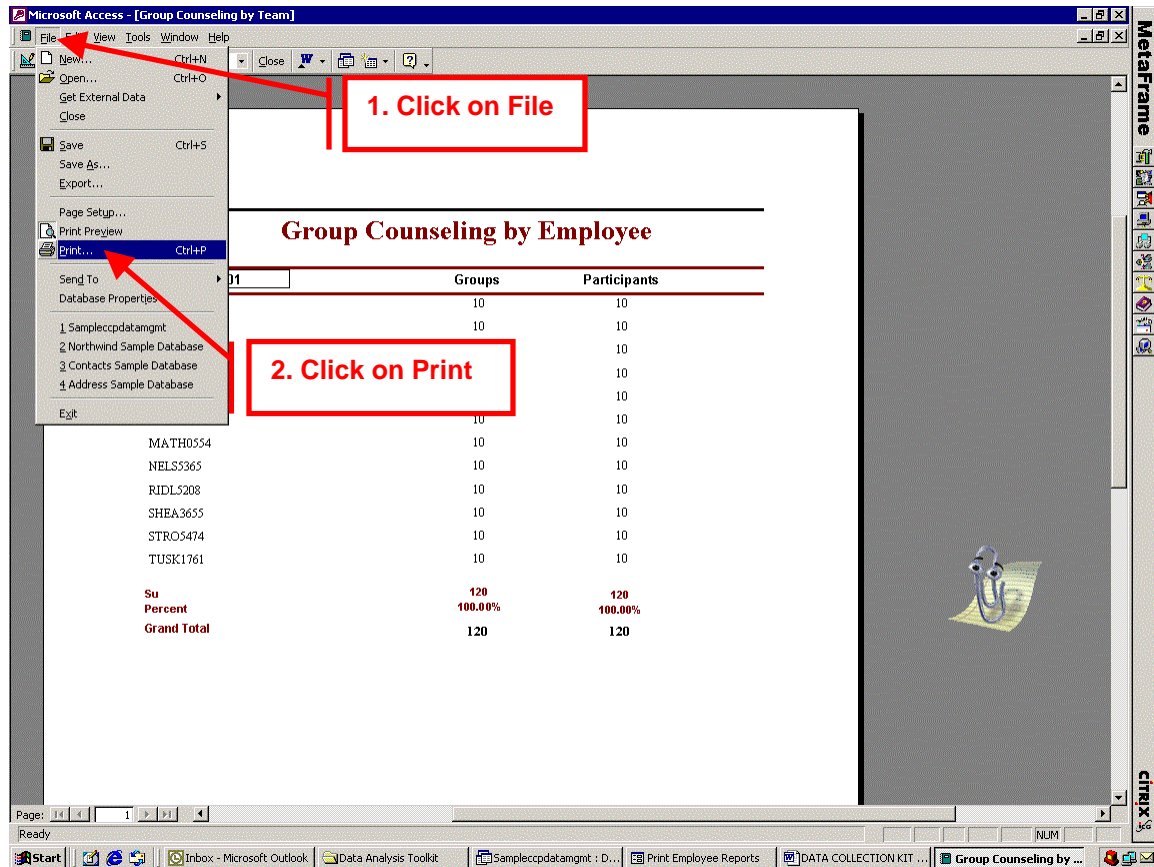
**Group Counseling by Employee**

November 2001	Groups	Participants
BECHE212	10	10
BRIJU4669	10	10
COOK4736	10	10
DANN2046	10	10
HARA3603	10	10
HASS7909	10	10
MATH0554	10	10
NELSS365	10	10
RIDL5208	10	10
SHEA3655	10	10
STRO5474	10	10
TUSK1761	10	10
<b>Sub Total</b>	<b>120</b>	<b>120</b>
<b>Percent</b>	<b>100.00%</b>	<b>100.00%</b>
<b>Grand Total</b>	<b>120</b>	<b>120</b>

## Printing a Report

Printing reports in Access is similar to printing in Microsoft Word. Follow these instructions:

1. Click on File, located in the toolbar.
2. A drop-down menu will appear. Click on Print.



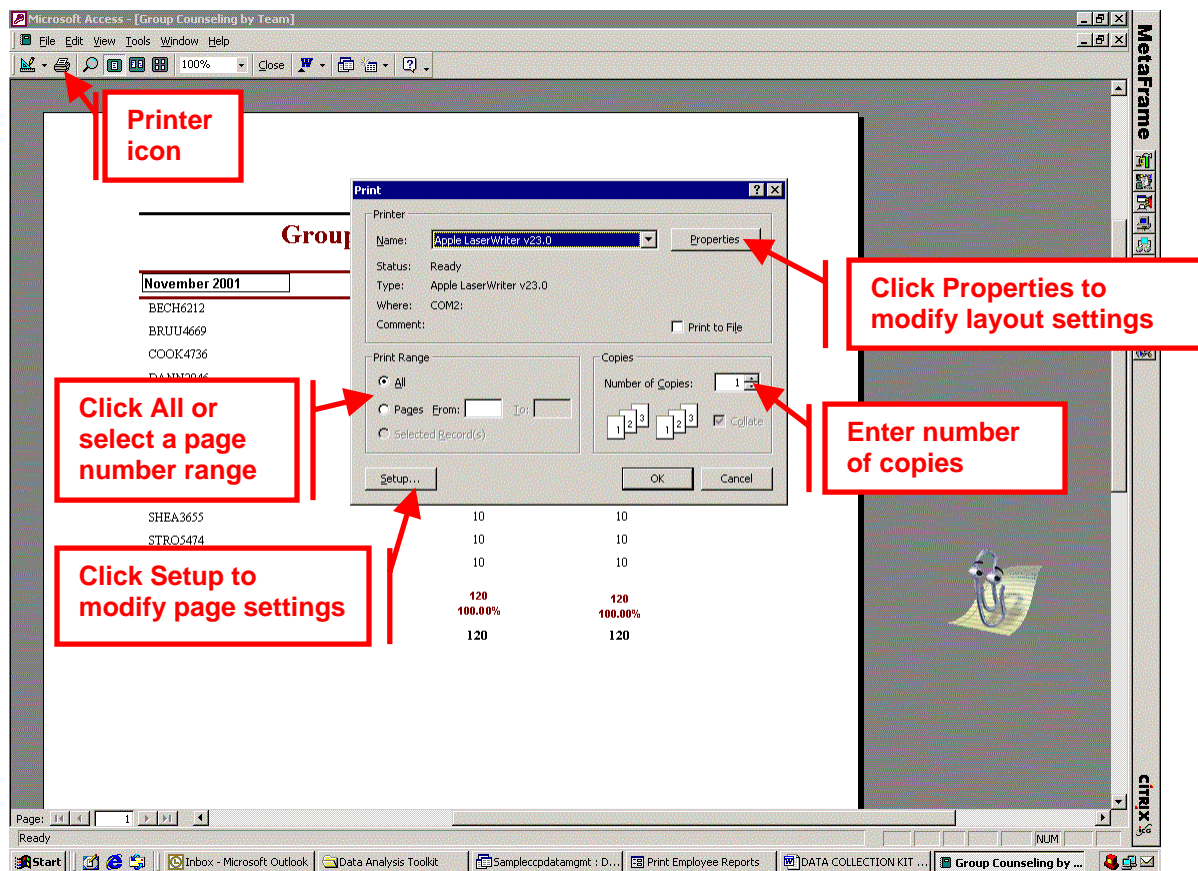
## Printing a Report

The following pop-up screen will appear:

- Click either on All (to print all pages) or Pages (to select specific pages) in the Print Range. If you select Pages, enter the specific page numbers. Also enter the Number of Copies in the Copies box.
- The Properties and Set-up buttons (indicated by the pink and orange arrows, respectively) are used to change page settings, graphics, and other settings.

When you have finished printing a report, click on the x control button (indicated by the blue arrow) and return to the Reports Switchboard. To familiarize yourself with this procedure, practice printing the other reports.

Once your printer is working well with the Reports program, you can click on the printer icon on the tool bar, indicated by the yellow arrow, to quickly print the report.

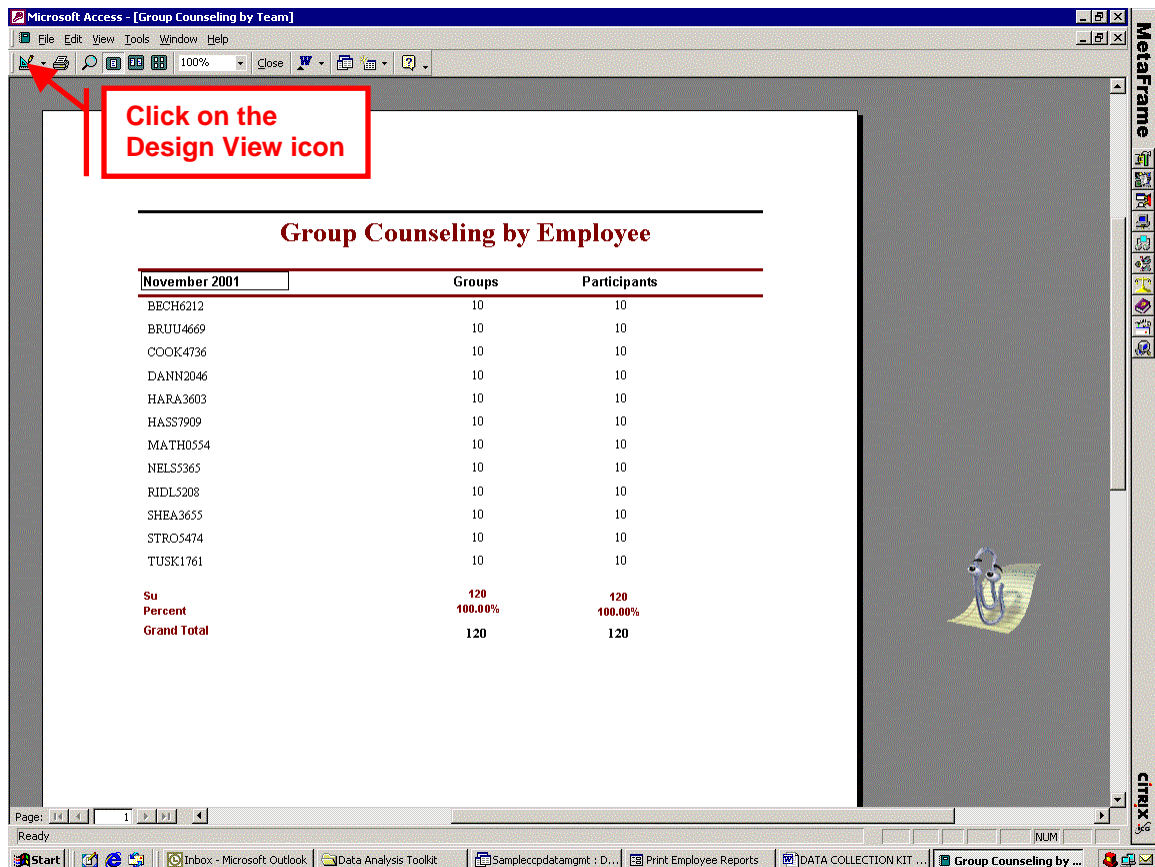


## Opening Design View

Reports may be modified through Design View. Changes in the content of the report should be discussed with a CMHS Project Officer to ensure that the changes meet Federal requirements. Additional reports may be created using Design View or the Reports Wizard.

Design View is opened as follows:

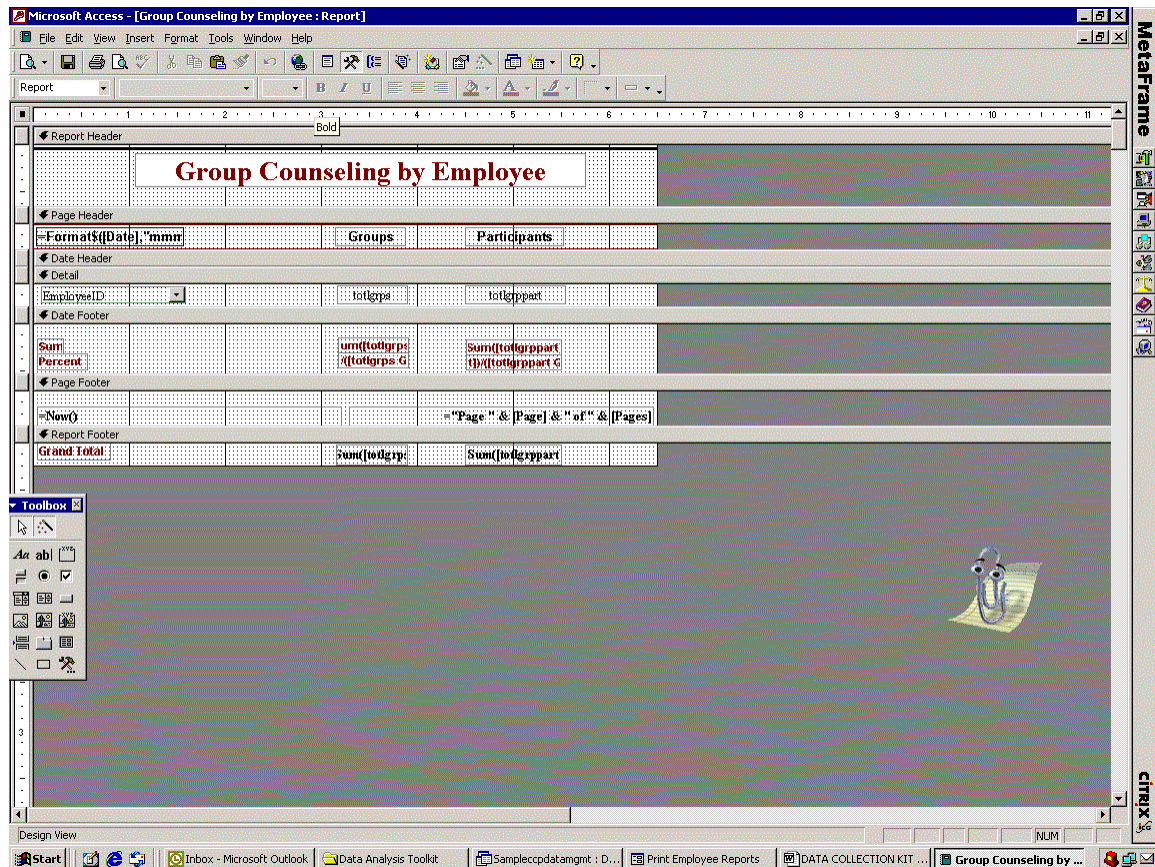
1. Click on the Design View icon.





## Opening Design View

The form will appear in design view mode. You may now make changes to the report or add enhancements such as your project logo.





# GLOSSARY

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**Access** is the database management system designed by Microsoft that has query, reporting, and other management features.

**Crisis Counseling** is short-term intervention with individuals and groups experiencing psychological sequelae to large disasters. This type of intervention involves the classic counseling goals of assisting people to understand their current situation and reactions, assisting individuals to review their options, providing emotional support, and encouraging linkage with other individuals and agencies who may assist the individual.

**Crisis Counseling Program (CCP)** was created by Section 416 of the Robert T. Stafford Disaster Relief and Emergency Assistance Act (Stafford Act), 1974, which authorizes the Federal Emergency Management Agency (FEMA) to fund crisis counseling assistance and related training activities in areas which have been declared disaster areas by the President of the United States.

**Center for Mental Health Services (CMHS)** works with FEMA through an interagency agreement to provide technical assistance and consultation, training for State and local mental health personnel, grant administration, and program oversight.

**Control Buttons** are used to close and resize windows.

**Database** is a collection of data arranged for ease and speed of retrieval.

**Federal Emergency Management Agency (FEMA)** is the lead Federal agency responsible for responding to natural and human caused disasters. The Stafford Act authorizes FEMA to provide a range of assistance to disaster victims and communities.

**Group Crisis Counseling Services** involve assisting or providing/facilitating support groups meeting with citizens, working in classrooms with affected students, working with affected teachers and administrators after school, assisting people to understand their current situation and reactions and review their options, as well as addressing their emotional support, and linking them with other individuals and agencies who may provide assistance. Groups may be assisted by a mental health professional, a paraprofessional, or the group members themselves.

**Group educational services** include public speaking at community forums, service group meetings, and local government meetings. The focus of group educational services is the providing of general information to survivors on available crisis counseling services and key concepts of disaster mental health. Group educational services are generally formal, scheduled events at which the crisis counselors are invited to make a presentation to a group.

**Individual Crisis Counseling Services** assist disaster survivors in understanding their current situation and reactions and reviewing their options, as well as addressing their emotional support and linking them with other individuals and agencies that may assist them. During individual services, crisis counseling staff members are active listeners who provide emotional support.

**Individual Educational Services** occur when the outreach worker or crisis counselor briefly discusses educational information with a disaster survivor. The discussion is not focused solely on material being distributed, but is a more general discussion on disaster services and/or key concepts of disaster mental health. These contacts are generally informal and occur throughout the disaster-impacted area, such as food distribution centers, Disaster Recovery Centers, and other disaster recovery operations.

**Material distribution** captures the number of handouts, flyers, and other materials distributed throughout the community.

**Referrals** are a key component of the CCP. In most disasters, the majority of survivors have needs that can be met by short-term, relatively informal intervention. However, in some circumstances, disaster survivors may need long-term, more formal mental health services that are beyond the scope of the Crisis Counseling Program. Survivors requiring longer-term, more formal mental health treatment should be referred to an appropriate agency or licensed mental health professional. Some disaster recovery needs may be physical, structural, or economical in nature, and addressing these issues is outside the scope of the CCP. In these instances, CCP staff members play a key role in referring survivors to specific disaster services available through FEMA Teleregistration, the American Red Cross, the Salvation Army, Interfaith Disaster Recovery Services, and Unmet Need Committees.

**Switchboard** is the term used for a user-friendly database interface. It may contain commands to open database forms, to preview reports, and to print documents, as well as other functions.

**Toggle Button** is a shortcut to other windows.

**Toolbar Buttons** are shortcuts to commands on the menu bar.